



Work Instructions for Agent Operations

Procedure manual for using the North American Home Express Web site.
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Using This Manual

Description

This section provides information about the purpose of the manual, the layout of its pages, and its use of special verbs, icons, and conventions.

Purpose and Audience

This manual supports the use of the Home Express Web site. The audience for this manual is employees of North American Van Lines and North American agent partners, who are responsible for entering updating or reviewing orders; performing operations planning; performing pre-call tasks; or performing other functions in the Home Express system.

Page Layout

This manual is intended for use in printed format, with the expectation that the pages are printed duplex (information on both sides of the page) and are kept in a three-ring binder.

The material is presented in a “two-page spread” layout. When the manual is open, figures appear on the left page, while related work instructions and explanatory text appear on the right page.

The figures are annotated with callouts. Callouts are used for the following reasons:

- To provide a brief reminder of actions to be taken. These appear in the left margin of the page and are numbered to correspond with the step described on the facing page.
- To point out features or contents of the screen under discussion. These may appear anywhere on the page and are not numbered.

The layout of the manual facilitates its use by people with different levels of experience with the system.

- An experienced user can scan down the outside margin of the left pages and follow the instructions provided in the callouts.
- An intermediate-level user can use the screen shots on the left-hand page and the numbered steps on the right-hand page in parallel.
- A novice user can work through the numbered steps and the detailed supplemental information on the right-hand pages.

Terminology

The work instructions contained in this manual include several action verbs. Each verb has a specific meaning:

Table 1—Terminology used in manual

<i>Select</i>	The act of using a computer device to mark a particular item for processing. The item is usually located in a list and then <i>selected</i> with the mouse. An example is selecting a menu option.
<i>Click</i>	The act of using the left mouse button to activate a command or option. For example, <i>click</i> the Change Password option.
<i>Right-click</i>	The act of using the right mouse button to activate a command or option. For example, <i>right-click</i> the browser window to display the Shortcut menu.
<i>Double-click</i>	The act of clicking the left mouse button two times in quick succession to activate a command or option. For example, <i>double-click</i> the Internet Explorer icon to launch the Web browser.
<i>Press</i>	The act of pushing a key on the keyboard to initiate an action within the computer. Keystrokes are not visible on the screen. For example, <i>press</i> Enter. Contrast with <i>Type</i> .
<i>Type</i>	The act of pushing a key, or series of keys, on the keyboard to supply input to the computer system. Keystrokes are visible on the screen. For example, <i>type</i> your User ID. Contrast with <i>Press</i> .

Icons Used

Work instructions may contain icons that signal supplemental material relevant to a particular step. Each icon has a particular meaning:

- A *note* presents additional information related to the step. A note is identified by a pencil, as shown below:



Supplemental text follows the icon.

- A *tip* offers a productivity suggestion, a shortcut, or an alternative method. A tip is identified by a light bulb, as shown below:



Descriptive text follows the icon.

- A *caution* indicates that an action, or failure to take an action, could have unwanted consequences. A Caution is identified by a triangle, as shown below:



Explanation of the consequences follows the icon.

- A *rescue* describes a method to recover from an unwanted situation or some other problem-solving technique. A rescue is identified by a life-saving ring, as shown below:



Recovery instructions follow the icon.

- A *reference* points you to additional material, in another document, on a particular topic. A reference is identified by an open book, as shown below:



Reference information follows the icon.

Other Conventions

This manual uses several other conventions designed to make it more usable. These conventions include the following:

- **Bold** text is used for the name of a software product or module; for the name of a menu, screen, window, or dialog box, and the selections that appear on any of these; for the name of a tab on a screen; and for the name of a key on the keyboard.
- *Italic* text is used to define a word, or for a field name in a dialog box, or for emphasis.
- Non-Proportional font is used to indicate text that the user must type exactly as shown.
- References to the names of documents appear in *italic*, and references to sections of a document appear in quotes. For example:



Refer to the *Product Tracking System User Manual*, “Creating Inbound Manifests.”

Conclusion

Information in this manual is laid out in a specific way, to make it easier to use. Being familiar with the layout of the manual allows you to take advantage of the time saving features used.

Getting Started with Home Express

Description

This section of the document gives you basic information that can be applied to the entire Home Express system. It is not specific to a single screen or a single task. The following items are included in this section:

- A high-level process flow of the system.
- A list of Home Express terminology.
- A list of Web terminology that is used with Home Express.
- A description of the screen layout.

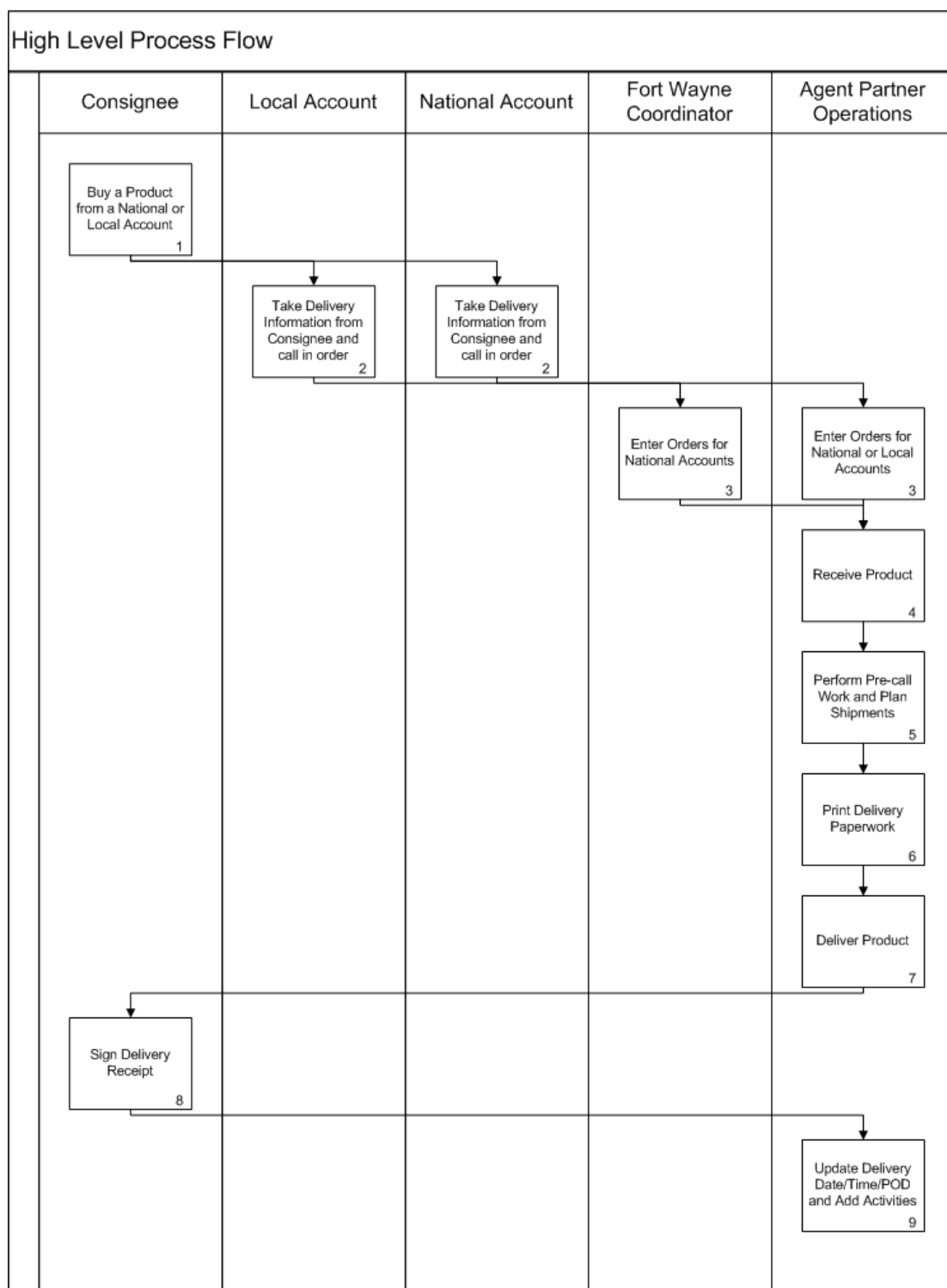


Figure 1—Home Express process flow chart

Understanding the Home Express Process

The diagram on the facing page is designed to show, at a very high level, the organizations and steps involved in processing an order in Home Express.

Before this process begins, the Home Express corporate staff negotiates contracts with national accounts and with agents. Based on the contracts, information about the account and the agent is entered into profiles. The account profile includes contact information, product information, rates for deliveries and accessorials, etc. The agent partner profile includes contact information, booking commission information, etc.

1. The process begins when the consignee places an order for a product. The order might be placed on a Web site, through a toll-free number or at a retail location.
2. The company that the consignee is ordering from records the delivery information, such as the consignee name, address, and phone number. If the company is a Home Express account, they contact a Home Express representative to place the delivery order. This is usually done with a phone call.
3. Either the Fort Wayne coordinator or someone from the agent partner (booking agent) enters the order into the Home Express system.
 - a. If the order is from a national account, the account might contact the Fort Wayne coordinator or a booking agent to place the order. Which group the account contacts depends on the processes negotiated with the account.
 - b. If the order is from a local account, the account contacts the agent partner to place the order.
4. The product is shipped from an account location, such as a warehouse, to the agent partner location. The transportation services might be managed by the account or by the Home Express coordinator. When the product is received, the order is updated to indicate that the product has been set off.
5. The agent partner operations team plans shipments to consignees and performs the pre-call steps. Some agent partners do the pre-call first while others do the shipment planning first. Home Express makes both processes easier.

When planning shipments, the operations planners use the system to assign orders to trucks and to truck dates. They also use it to add delivery dates and times.

When performing the pre-call steps, the agent partner contacts consignees and notifies them of the delivery dates and times. They also verify delivery details, such as the address, contact name, and contact phone number.

6. After the deliveries are planned, the operations planners print delivery receipts and driver manifests.

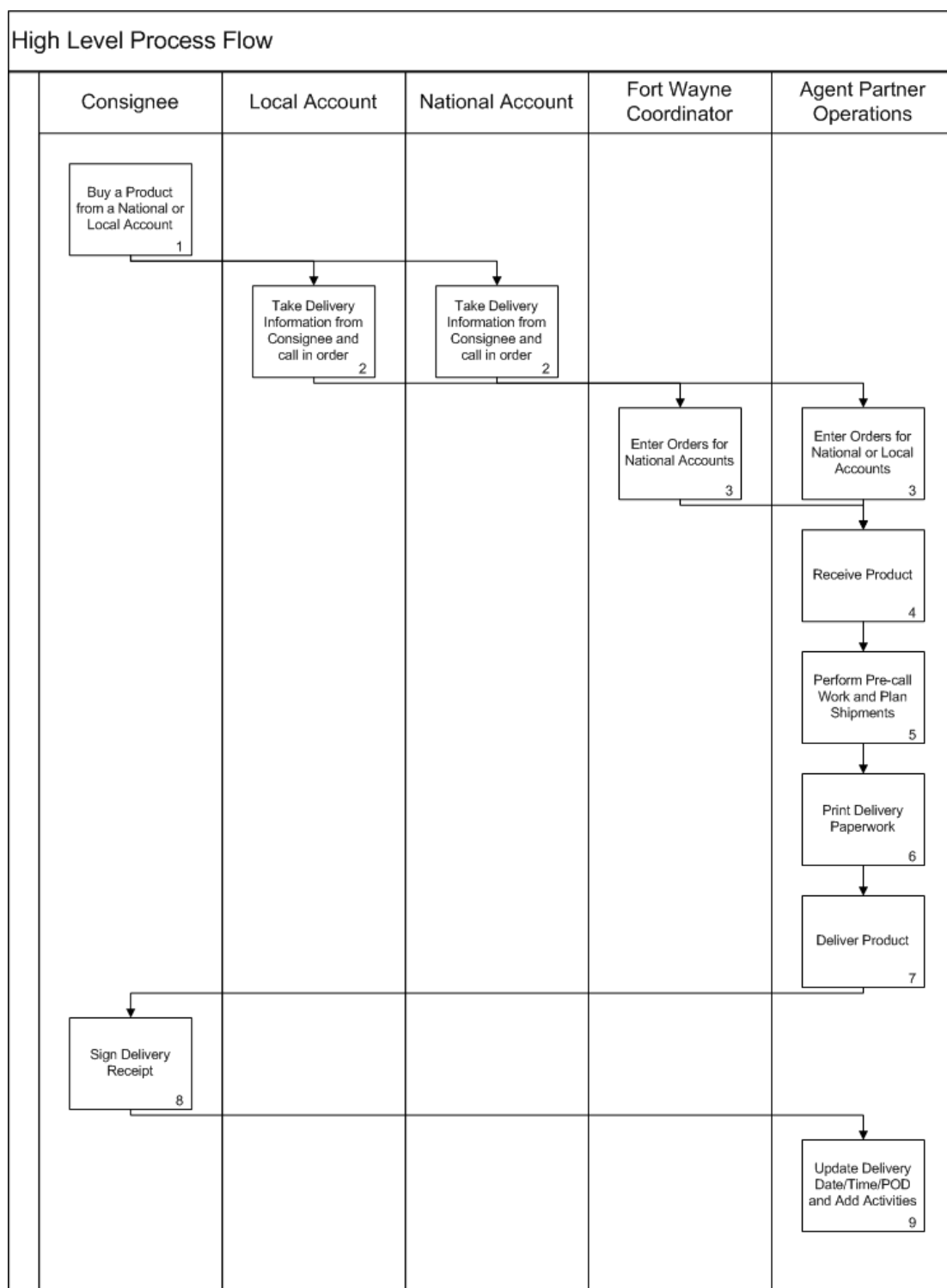


Figure 2—Home Express process flow chart

7. The driver delivers the product to the consignee. If the driver provides any extra service during delivery, such as carrying items up more than three flights of stairs, the service is noted on the delivery receipt.
8. The consignee signs the delivery receipt. The delivery receipt is used as proof-of-delivery and as a record of extra services. The driver updates the manifest as deliveries are made. The driver returns the completed delivery receipts and manifest to the agent operations planner.
9. The operations planner updates the following information for the Home Express order:
 - Any extra activities not already recorded.
 - The actual date and time of delivery.
 - The proof of delivery information, which is the name of the person who signed for the delivery.

Understanding Home Express Terminology

There are some terms used in the Home Express system that you need to be familiar with. They are used throughout the system and in this manual.

Table 2—Terminology used with Home Express

<i>Agent partner or Provider</i>	Company or person who performs the service. Usually the service performed is delivery of products to consignees. In the case of transportation orders, the service provided is transportation from one location to another.
<i>Account</i>	The company that the provider is delivering products for. For example, if we deliver products for Acme Home Furnishings, then they are the account. Accounts can be national accounts or local accounts.
<i>National Account</i>	A national account is one with locations in multiple areas of the country and a single contract agreement with SIRVA.
<i>Local Account</i>	A local account is one within a local area and with a contract agreement with a specific agent partner.
<i>Consignee</i>	The person or company we deliver products to. Usually, it is a person.
<i>Customer</i>	To avoid confusion we try not to use the word customer. Customer could mean the account (SIRVA's customer) or the consignee (the account's customer), depending on your perspective.
<i>Order</i>	A request to move product for an account. There are several types of orders used in Home Express. Orders are explained in detail in other sections of this manual.
<i>Order Status</i>	Orders have different statuses as they go through the process of delivery and billing. The following status settings are used: • Open—New order; no action has been taken on the order. • In Transit—Product is in the process of being shipped from an account location to the agent partner location. • Set Off—Product is at the agent partner location. • Delivered—Product has been delivered to the consignee. • Complete—Agent partner has updated the order as needed; it is ready to be billed. • Billed—Account has been billed for the order. • Canceled—The order has been canceled by the consignee or the account. • Hold—The order is temporarily on hold.
<i>Project</i>	Another term for an order.

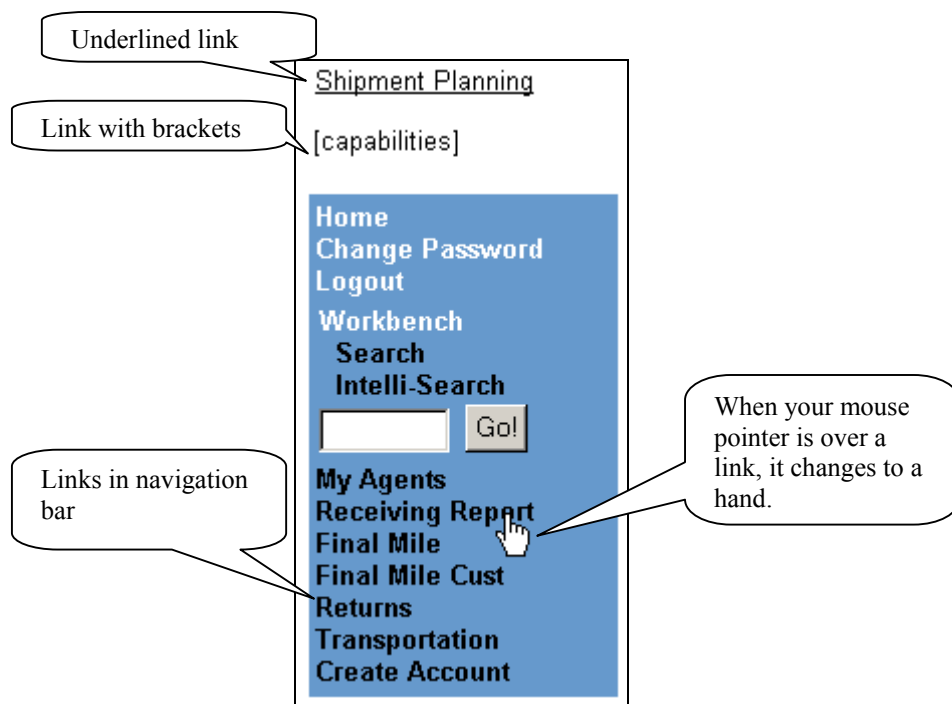


Figure 3—Examples of links

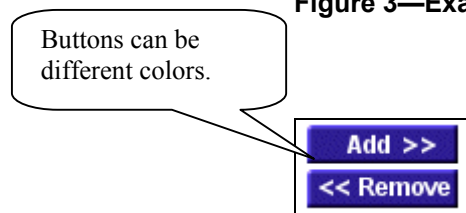


Figure 4—Examples of buttons

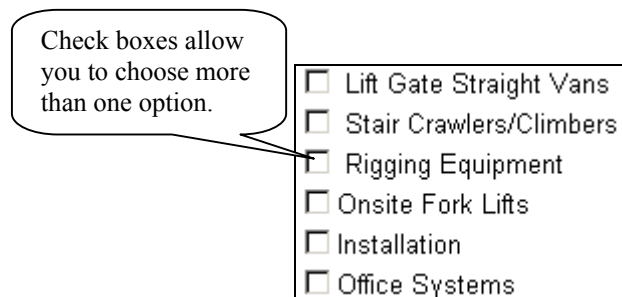


Figure 5—Examples of check boxes

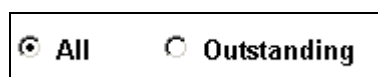


Figure 6—Example of option buttons

Option buttons let you pick from a list of options. You can only pick one option.

Understanding Web Browser Terminology

There are standard features that appear throughout Home Express that allow you to interact with the system. They are common to Windows based systems, so you might have used them in other applications. It doesn't matter what type of Web browser you are using to access Home Express, these features work the same way in most browsers.

Table 3—Terminology used with Web sites

<i>Links</i>	Allow you to move from one Web page to another. Links are usually underlined text but might be represented by an icon or other symbol. When the mouse pointer is positioned over a link, it changes from an arrow to a hand. <i>See Figure 3.</i>
<i>Drilling Down</i>	<i>Drilling down</i> refers to the process of going from less specific information to more specific information by clicking a link on a Web page. For example, a Web page might show summary order information and have links associated with the order numbers. By clicking an order number, you <i>drill down</i> to more specific information about an order.
<i>Buttons</i>	Buttons are rectangular. They are labeled with a name and are usually a different color than the rest of the screen. You click a button to initiate an action. <i>See Figure 4.</i>
<i>Check Boxes</i>	Allow you to select one or more options from a list. A box precedes each option. When you click the box, the system places a check mark in the box, indicating that it is selected. When you click the box again, the system removes the check mark. You can select more than one option at a time. <i>See Figure 5.</i>
<i>Option Buttons</i>	Option buttons are round buttons that let you select between several different options. When you click on an option button, the center of the button turns black, indicating that it is selected. You can only choose one option. If you click on a different option, the first option is de-selected and the second option is selected. <i>See Figure 6.</i>

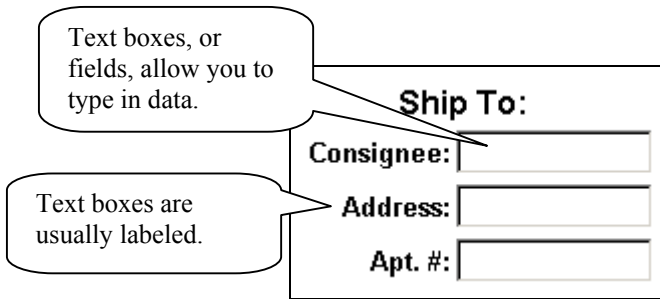


Figure 7—Examples of text boxes

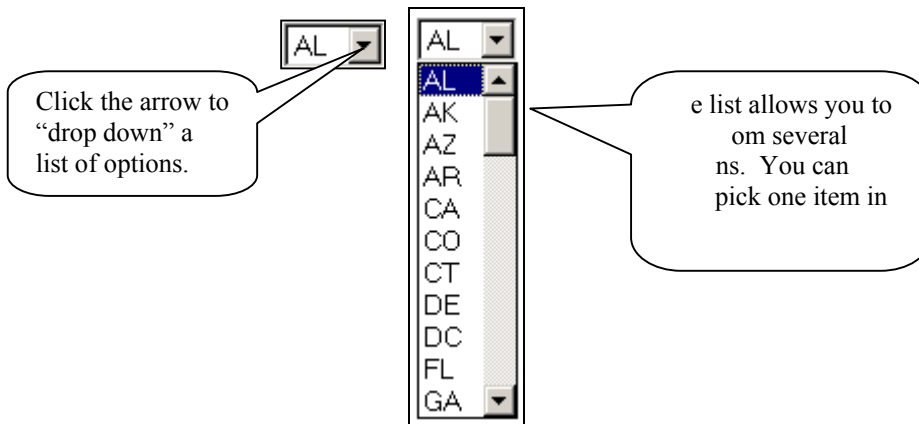


Figure 8—Examples of a drop-down list, before and after clicking the down arrow

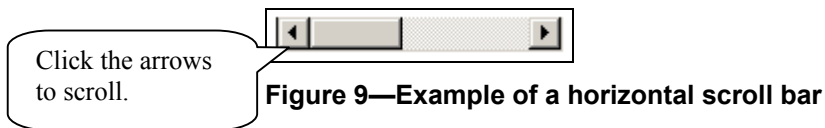


Figure 9—Example of a horizontal scroll bar

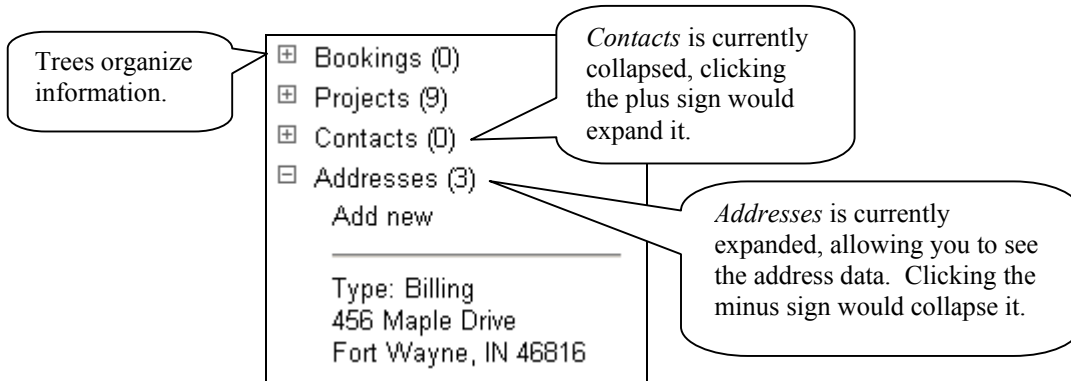


Figure 10—Example of a tree structure

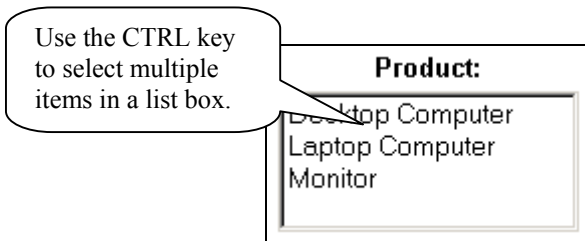


Figure 11—Example of a list box

<i>Text Boxes</i>	Text boxes are rectangular areas in which you type text. Click in the box to position the insertion point, and then type the text. Text boxes are also called fields. Some people refer to the text typed in a text box as <i>free-form text</i> because it doesn't have to be in any specific format. You can include letters, numbers, and most symbols. <i>See Figure 7.</i>
<i>Drop-down lists</i>	Displays a text box followed by a down arrow. Clicking on the down arrow displays a list of options. Use the mouse to select an option. The system displays the selected option in the text box at the top of the list. You can only select one option at a time. <i>See Figure 8.</i>
<i>Scroll bars</i>	Automatically appear when the Web page is too big to fit on the screen. If the page is too long, the system adds a vertical scroll bar so that you can move up and down. If the page is too wide, the system adds a horizontal scroll bar so that you can move left and right. Click the arrows at each end of the scroll bar to move in that direction. <i>See Figure 9.</i>
<i>Trees</i>	Trees are used to organize data into categories. As you use Home Express, there will be a lot of data in the system that needs to be organized. You use the tree structure on the My Agents screen. <i>See Figure 10.</i>
<i>Expand and Collapse Icons</i>	Data in trees can be either expanded (displayed) or collapsed (hidden). The expand and collapse icons switch a tree between the two states. If the list is currently collapsed, the expand icon (plus sign +) is visible. Clicking it expands the list. If the list is currently expanded, the collapse icon (minus sign -) is visible. Clicking it collapses the list.
<i>List box</i>	A list box is similar to a drop-down list because it contains a list of items. However, you do not have to click an arrow to access the list. You can select more than one item at a time from a list box using these steps: 1. Click on the first item you want to select 2. Hold down the control key (CTRL) 3. Click on additional items. If you don't hold down the control key when clicking multiple items, the system de-selects the first item and then selects the next one you click on. <i>See Figure 11.</i>

NAVIL - Home Express - Microsoft Internet Explorer

Home Express - Operation's Home

Order Status: Shipment Planning

SCAC Code	Order #	Consignee	Address/City/State	Zip	Order Type	Order Status	Freight Available	Actual SetOff	Est. Del. Date	Reg. Del. Time	Weight	Map C.rd	Truck	Truck Date
BDF1	1825	Susan Tarbox	123 Oak street lasfaskj MN	55810	Local	Open	4/28/2003		4/28/2003	noon	25			
ACHF	1824	asldkjf	.lkj .lkj MN	55810	Final Mile	Open	4/28/2003		5/4/2003	Morning	18			
ACHF	1811	Susan Tarbox	123 Oak Street Duluth MN	55812	Returns	Open	4/16/2003					C	1	4/30/2003
ACHF	1810	Susan Tarbox	123 Oak Street Duluth MN	55812	Returns	Open	4/16/2003							
CECM	1809	Kim Kluempke	987 Maple Lane Duluth MN	55811	Returns	Open	4/22/2003				15			
CECM	1808	Kim Kluempke	987 Maple Lane Duluth MN	55811	Final Mile	Delivered	4/16/2003		4/21/2003	anytime	51	A5	478	4/18/2003
ACHF	1807	Kim Kluempke	123 Oak St. Duluth MN	55812	Final Mile	Delivered	4/16/2003		4/21/2003	13:00	180	J2	478	4/18/2003

Navigation bar

Work area

Figure 12—Operations Home screen

Using the Operations Home Screen

When you log into Home Express, the first screen the system displays is the Operations Home screen.

The Home screen has two main purposes. First, it automatically lists all active orders for the agent partner, making it easy to see the work that needs to be done. The operations planner uses the Home screen as a starting point for planning shipments and performing pre-call steps. Second, the Home screen is also used to navigate, or move around, the Home Express system. It includes a search option, which makes it easy to find information in the system.

Identifying Areas of the Home Screen

The Home screen is split into two main areas: the navigation bar on the left side of the screen and the rest of the screen. The navigation bar has a blue background and contains white and black text. It allows you to select options. When you click on an option, the system moves to a different screen. The rest of the screen has a white background. It is used as a work area, where you enter information or work with the data in the system. For example, to enter an order you would select an order entry option from the navigation bar and then, in the work area, you would type in the data for the order.

Viewing Large Amounts of Information

You might have to scroll to see the entire screen. If the information is too wide to be displayed on your screen, you will have to scroll horizontally (left and right) to see all of the information. If the information is too long to be displayed on your screen, you will have to scroll vertically (up and down) to see all of the information.

Understanding the Color Coding System

The rows of information are color-coded to make it easier to understand the type of order you are working with. Also, the color-coding makes it easier to read a row of information, especially when you have to scroll horizontally. It leads your eye horizontally across the row and prevents you from accidentally reading the wrong row.

Orders from national accounts are colored white and yellow in alternating rows. Orders from local accounts are colored gray.

Conclusion

The preliminary information contained in this section is important. It is the starting point for understanding and using the Home Express system.

Accessing the System

Description

Home Express is a Web based system. For the system to work properly, you must have the correct version of the Internet Explorer software. This section describes checking the version of your software and where to update your software if needed.

The Home Express Web site is password protected because it contains customer information. Logging in requires an ID and password, which must be set up in the system by the system administrator.



If you need to request a user ID and password, please contact the Fort Wayne coordinator.

The options and orders that you can access on the Web site are based on your user ID. For example, employees of agent partners can see different options than the Fort Wayne Coordinators can see. Passwords should be changed periodically to keep them secure.

This section of the user manual describes the security options used with the Home Express Web site, including instructions for logging in, logging out and changing your password.

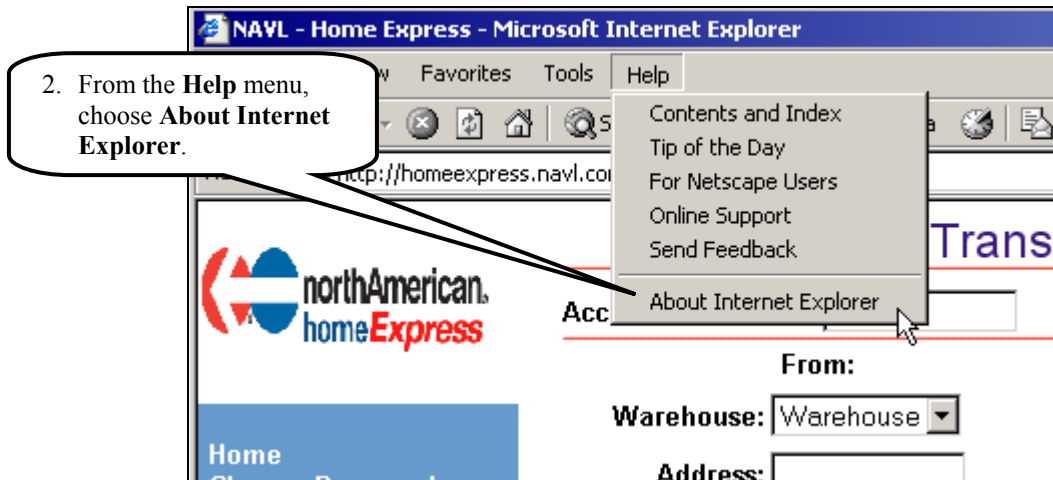


Figure 13—Internet Explorer Help menu

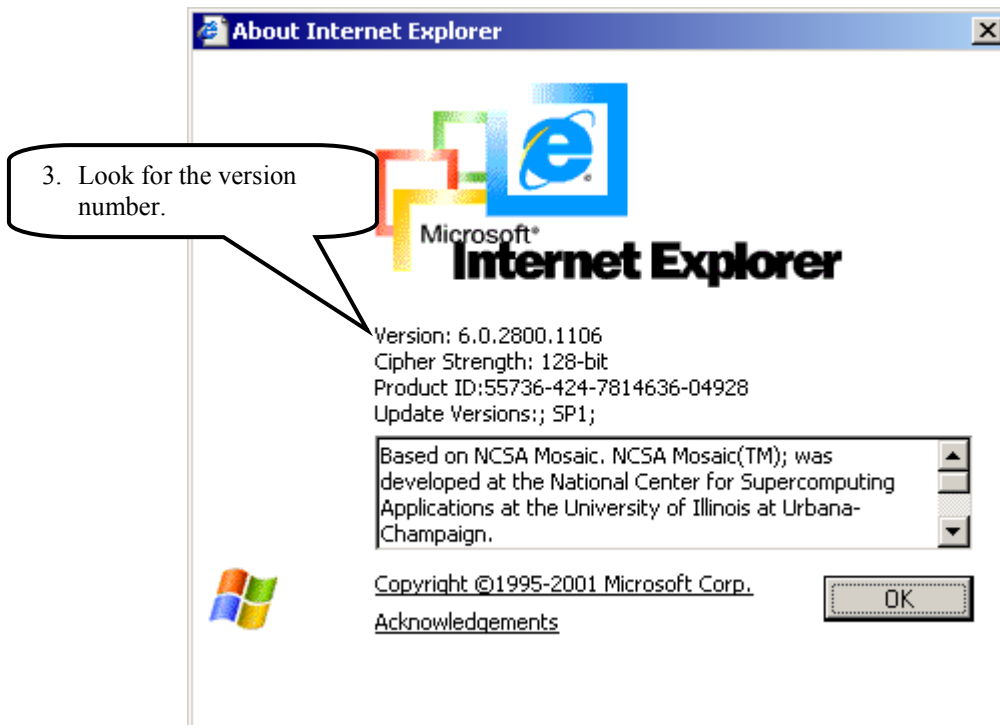


Figure 14—About Internet Explorer dialog box

Internet Explorer

In order to use the Home Express system, you must use Internet Explorer version 5.5 or higher. If you use a lower version of Internet Explorer or a different browser, the system might not work correctly. For example, some users have had trouble printing delivery receipts because they were using a previous version of the Internet Explorer software.

Instructions: Checking the Version of Your Browser.

Use the steps below to check the version of your browser.

1. Launch Internet Explorer.
2. From the **Help** menu, choose **About Internet Explorer**.
The system displays the **About Internet Explorer** dialog box.
3. Look for the version number.



If you need to upgrade your browser software, Microsoft Corporation offers a free download from their Web site: www.microsoft.com.

Logging In and Logging Out

Logging in allows you to access the Home Express Web site.



After logging in, you can change your password. You can change your password whenever you need to; you do not have to wait until your password expires before changing it. *See* “Changing Your Password” on page 23.

Logging out allows you to exit the system. It prevents unauthorized users from accessing customer data. It is a good idea to logout anytime you are away from your desk. The logout option is displayed in the navigation area on the left side of the screen. You can log out from anywhere in the Home Express Web site; you do not have to be on a specific screen.

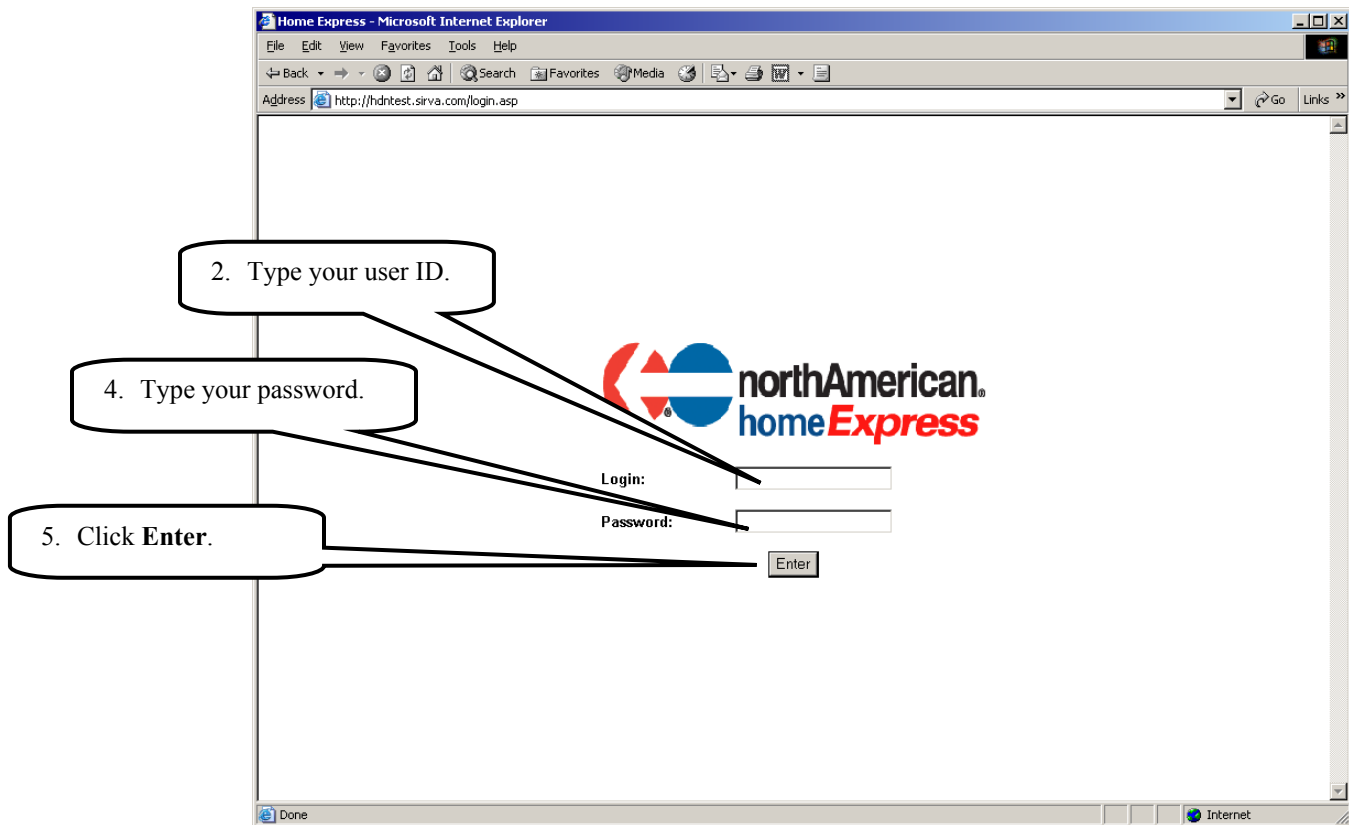


Figure 15—Login screen

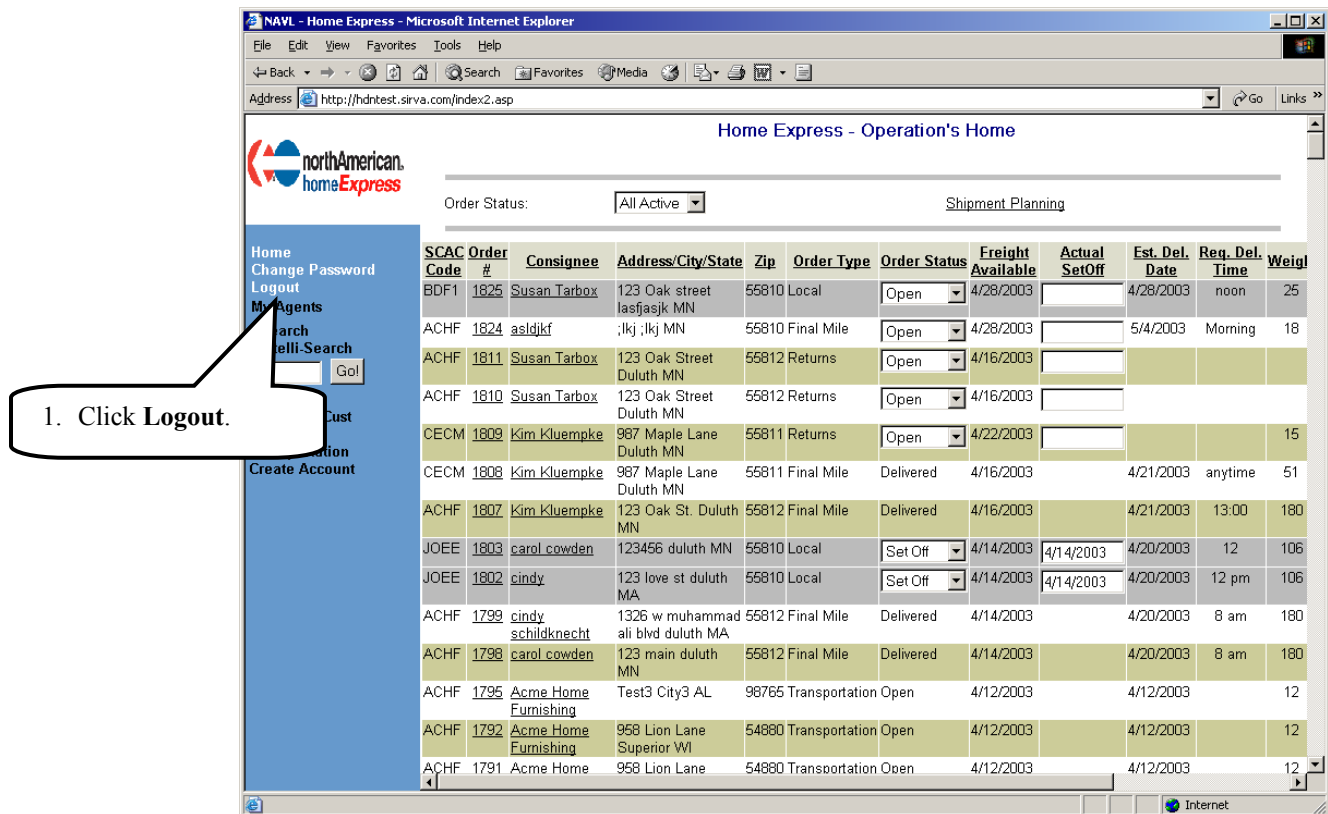


Figure 16—Operations Home screen

Instructions: Logging In



These instructions assume that you have launched your Web browser software.

Log in to Home Express using the steps below:

1. Go to the Home Express Web site: **http://homeexpress.navl.com**.
The system displays the **Home Express Web Site Login** screen.
2. Type your ID in the *Login* field.
3. Press **Tab**.
4. Type your password in the *Password* field.
5. Click **Enter**.
The system displays the **Home Express Operation's Home** screen.

Instructions: Logging Out



If your system is idle for 15 minutes, the system automatically logs you out of Home Express. If the system logs you out, use the steps above to log back in.



These instructions assume that you are currently logged in.

Log out of Home Express using the steps below:

1. In the navigation bar, on the left side of the screen, click **Logout**.
The system displays the **Home Express Web Site Login** screen.

Changing Your Password

Passwords are a key part of the security for the Home Express Website. You should change your password periodically for security purposes.

The minimum password length is 1 character. The maximum length is 10 characters. You can use a combination of letters and numbers in your password.



Do not share your password with anyone. As a security precaution, when you type the password, it is not displayed on the screen. Asterisks (*) are displayed in place of the characters typed.



If you forget your password or need help logging in, please contact the Customer Service Center (CSC) at 1-800-999-5917, option 2.

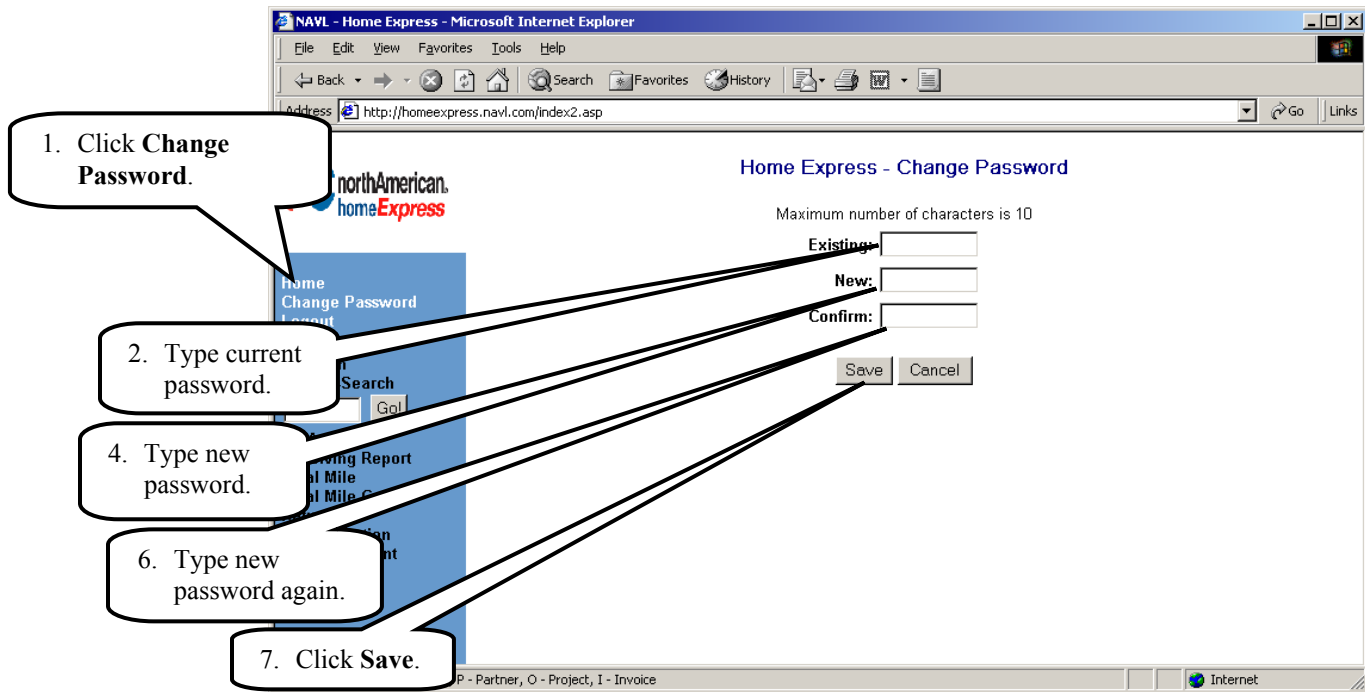
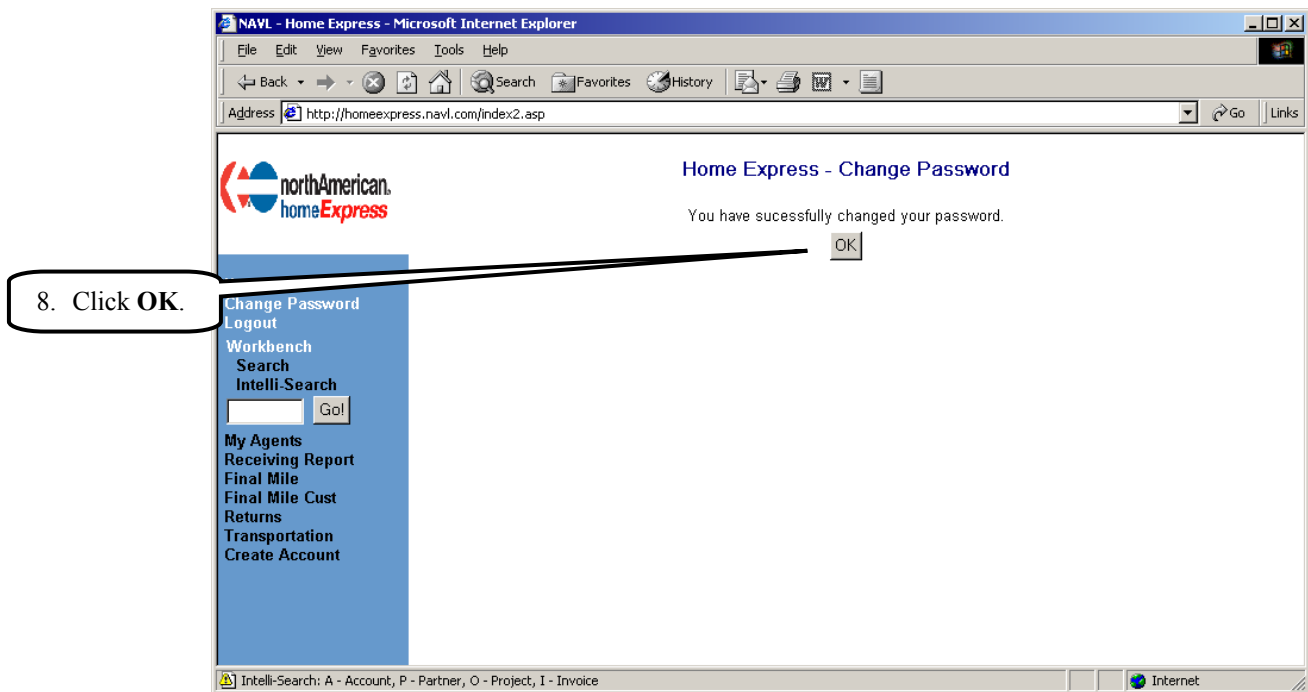


Figure 17—Login screen



Instructions: Changing Your Password



These instructions assume that you are logged in to the Home Express Web site.

Change your password by using the steps below:

1. In the navigation bar, click **Change Password**.
The system displays the **Change Password** screen.
2. Type your current password in the *Existing* field.
3. Press **Tab**.
4. Type your new password in the *New* field.
5. Press **Tab**.
6. Type your new password again in the *Confirm* field.



The system requires you to type your new password twice, in both the *New* field and the *Confirm* field, to make sure that there are no typographical errors.

7. Click **Save**.
The system changes your password and then displays a confirmation screen.
8. Click **OK**.
The system clears the screen.
9. In the navigation bar, click **Home** or another option.

Conclusion

The processes for logging in, logging out and changing your password are similar to the processes used by other systems. These processes are used to keep our customers' information secure.

Locating Information About Orders

Description

This section of the manual describes using several order information screens. Order information screens are used to review orders. You can use them to look up information whenever it is needed. Some of them are also used to edit information about an order.

The first step in accessing information about an order is to locate the order on the Operations Home screen. After you locate the order, you drill down for more detailed information. You can then make corrections or updates. If you make changes to an order, you save the changes. You can then look at more information about the same order or return to the Home screen and do other tasks.

1a. Sort by order status.

1b. Click a column heading to sort by that column.

2. Click the order number or the consignee name.

SCAC Code	Order #	Consignee	Address/City/State	Zip	Order Type	Order Status	Freight Available	Actual SetOff	Est. Del. Date	Req. Del. Time
JDCS	3092	Susan Tarbox	987 Maple Lane Duluth MN	55811	Returns	Open	8/28/2003			
ACE1	3084	Susan Tarbox	652 Elm Street Duluth MN	55810	Local	Open	8/27/2003		8/27/2003	
JDCS	3082	Susan Tarbox	987 Maple Lane Duluth MN	55811	Final Mile	Open	8/26/2003		8/31/2003	anytime
ACHF	3081	Susan Tarbox	854 Pine Avenue Duluth MN	55810	Final Mile	Open	8/27/2003		9/1/2003	morning
JDCS	3080	Susan Tarbox	123 Oak Street Duluth MN	55812	Final Mile	Open	8/26/2003		8/31/2003	13:00
JDCS	3079	Mary Jones	123 Maple Drive Duluth MN	55819	Returns	Open	8/26/2003			
JDCS	3078	Mary Jones	123 Maple Drive Duluth MN	55819	Final Mile	Set Off	8/27/2003	8/27/2003	9/1/2003	Morning

Figure 18—Operations Home screen

3. Click a different tab to see more information.

Notice the order type.

Order ID: 3078

Details II

Customer Name: Joe's Discount Computers Customer ID: JDCS Express

Order Type: Final Mile Acct Ref #: J93894

Consignee: Mary Jones Booking Agent Name: NAVL TM

Status: Set Off Booker Phone:

Address: 123 Maple Drive Booker Contact: Lucette Dietrich

City: Duluth Freight Available: 8/27/2003

State: Minnesota Est. Del. Date: 9/1/2003

Zip: 55819 Req. Del. Time: Morning

Country: United States Scheduled Date:

Contact Name: Mary Jones Scheduled Time Between: -

Phone: (555) 899-6321 Actual Date:

Actual Time:

Figure 19—Using the information tabs

Instructions: Accessing Information About an Order

Use the instructions below to access information about an order:



These instructions assume that you are on the **Operations Home** screen. If you are not on that screen, click **Home** before starting these instructions.

1. Two options make it easier to find orders in the system. You can use these options individually or together.

- a. Select an order status from the **Order Status** drop-down list.
The system displays only the orders that have the status selected.

- b. To sort the information, click any column heading that is underlined.



The first time you click a column heading, the system sorts the data in ascending order (A to Z or 0 to 9). The second time you click a column heading, the system sorts the data in descending order (Z to A or 9 to 0).

2. To drill down for more detailed information, click *either* the order number or the consignee name.

- If you click the order number, the system displays the **Details II** tab.
- If you click the consignee name, the system displays the **Call Sheet** tab.

3. To see additional information, click a different tab.



After drilling down, the system displays tabs at the top of the screen. The tabs allow you to switch from screen to screen. If you move your mouse over the tabs, some of the text changes color. On some tabs, the text turns red, while on the others it stays black.

You can use any tab that has red text; simply click on the tab. Only the coordinators in Fort Wayne use the tabs with black text. If you try to click a tab with black text, nothing happens.

The screenshot shows the 'Details II' screen in the NAVL Home Express web application. The browser window title is 'NAVL - Home Express - Microsoft Internet Explorer'. The address bar shows 'http://hdntest.sirva.com/index2.asp'. The navigation bar includes links: Main, Account, Details I, Details II, Call Sheet, Partner, Rates, Activities, Inventory Summary, and Invoice. The left sidebar contains links: My Agents, Search, Create Account, Contact Us, FAQ, and Reference Manual. The main content area is titled 'Details II' and displays the following information:

Customer Name:	Joe's Discount Computers	Customer ID:	240	SCAC ID:	JDCS	Business Express:	Home
Order Type:	Final Mile	Acct Ref #:	J93894	Booking Agent Name:	NAVL TM	Booker Phone:	
Consignee:	Mary Jones	Booker Contact:	Lucette Dietrich	Freight Available:	8/27/2003	Est. Del. Date:	9/1/2003
Status:	Set Off	Req. Del. Time:	Morning	Scheduled Date:		Scheduled Time Between:	
Address:	123 Maple Drive	Actual Date:		Actual Time:		POD Name:	
City:	Duluth	Actual Setoff:	8/27/2003	Trans Order Number:	3083	Account Instructions:	
State:	Minnesota						
Zip:	55819						
Country:	United States						
Contact Name:	Mary Jones						
Phone:	(555) 899-6321						
BOS Contract:							
Order Notes:							

Callouts indicate the following actions:

1. Edit consignee name.
2. Change *Status*.
3. Edit other consignee information.
4. Add or change *Order Notes*.
5. Add or change account reference number.
6. Edit dates and times.
7. Enter *POD* information.
8. Enter *Actual Set off* date.

Figure 20—Upper portion of Details II screen

Instructions: Using the Details II Tab

The **Details II** screen shows information about the order. Most of the information comes from the order when it is entered into the system. Operations personnel at the agent partner location enter other information using this screen.

There are several different order types. The **Details II** screen looks slightly different for the different orders. However, they work in the same way.



These instructions assume that you are on the **Operations Home** screen. If you are not on that screen, click **Home** before starting these instructions.



You should update an order anytime something changes. Don't wait to make changes. If you wait to make changes, you might key information.

1. Add or edit consignee name.

2. Change the *Status* field.



If you change Status to Set off, you must enter an actual set off date.

3. Add or edit other consignee information: address, city, state, zip, country, contact name, or phone.

4. Add or edit *Order Notes*.

5. Add or edit *Acct Ref #*.

6. Add or edit dates and times. There are four sets of dates and time displayed on this screen:

- *Freight Available date.*
- *Est. Del. Date and Request Del. Time.*
- *Scheduled Date and Scheduled Time Between.*
- *Actual Date and Actual Time.*



The scheduled date and time and the actual date and time can also be entered on the **Operations Planning** screen. See "Instructions: Planning Shipments" on page 197.

7. Add *POD* (proof of delivery) information.



The POD information can also be entered on the **Operations Planning** screen. See "Instructions: Entering Proof of Delivery Information" on page 203.

8. Enter the *Actual Set Off* date.



Don't forget to update the status to the current status.

NAVL - Home Express - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address http://hdntest.sirva.com/index2.asp

Main Account Details I Details II Call Sheet Partner Rates Activities Inventory Summary Invoice

Order ID: 3078

Trans Order Number: 3083

Order Notes: Account Instructions:

Product Information

Available Products:

- Accessory kit
- Desktop Computer
- Laptop Computer
- Monitor
- Printer

Add >> << Remove

Selected Products:

- Desktop Computer
- Monitor

Order Weight: 54

Partner Information

Performing Partner: XYZ Transportation

Partner Jack: Henry Davids

Partner Phone:

Survey History Comments Save

8. Add or remove products.

9. Click Save.

Figure 21—Lower portion of Details II screen



Account Instructions are read only. Only coordinators can change the Account Instructions.

9. Edit product information as needed.

a. Add products.

1) Click on one or more products in the *Available Products* list.

2) Click **Add**.

Or

b. Remove products.

1) Click on one or more products in the *Selected Products* list.

2) Click **Remove**.

10. To save changes you have made on the **Details II** screen, click **Save**.

After clicking **Save**, the system updates the order weight and then saves the information.



For information about adding comments, *see* “Instructions: Adding or Reviewing Comments” on page 51.

Field Table: Details II Screen for Final Mile Orders

The following fields are used on the Details II screen for Final Mile orders.

Table 4—Details II screen (final mile orders) field definitions

Field Name	Description	Field Type	Notes
Order ID	ID number used to uniquely identify an order in the Home Express system.	Display only	
Customer Name	Name of the account that is shipping products to the consignee.	Display only	
Customer ID	Identification number for the account that is shipping products to the consignee.	Display only	
SCAC ID	SCAC ID for the account that is shipping products to the consignee.	Display only	<i>SCAC</i> is an abbreviation for Standard Carrier Alpha Code. A SCAC ID is a four-character code used to identify the account.
Business Type	Will always show <i>Home Express</i> .	Display only.	
Order Type	Indicates the type of shipment for the order.	Display only	Possible values are: • Final Mile • Final Mile Customer • Returns • Transportation
Consignee	Name of person or company the account is shipping product to.	Optional	This information is entered as part of the order. You can edit this field.
Status	Current state of the order.	Optional	Sometimes changed by the system. For example, when you enter the actual date and time of delivery and the POD information, the system changes the status to <i>Delivered</i> . Can also be changed by the operations planning staff. For example, when product arrives at the agent partner location, the operations planner changes the status to <i>Set Off</i> .

Field Name	Description	Field Type	Notes
Address	First line of the consignee's address.	Optional	
Address, line 2	Second line of the consignee's address.	Optional	
City	City of the consignee.	Optional	
State	State of the consignee.	Optional	
Zip	Zip code of the consignee.	Optional	
Country	Country of the consignee.	Optional	The default value is United States.
Contact Name	Name of contact person at the consignee's location. May or may not be the same as the consignee.	Optional	
Phone	Phone number of the contact person.	Optional	
BOS Contract	Contract number for this shipment in BOS (Base Operating System)	Optional	
Acct Ref #	Number, such as a purchase order number, used by the account to reference this order. This number is provided by the account.	Optional	
Booking Agent Name	Name of the booking agent for this account.	Display only	
Booker Phone	Phone number of the booking agent contact person.	Display only	
Booker Contact	Name of person at the booking agent location that can be contacted about this account.	Display only	
Freight Available	Estimated date on which the freight will arrive at the provider agent location.	Optional	
Est. Del. Date	Estimated date on which the freight will be delivered to the consignee.	Optional	

Field Name	Description	Field Type	Notes
Req. Del. Time	Time of day when the consignee would prefer the delivery to take place.	Optional	Req. is an abbreviation for <i>requested</i> , not required.
Scheduled Date	Date that the product will be delivered to the consignee. Assigned by the planner.	Optional	Can be entered on this screen or as part of the shipment planning process.
Scheduled Time Between	Time range during which the product will be delivered to the consignee. Assigned by the planner.	Optional	Can be entered on this screen or as part of the shipment planning process.
Actual Date	Date on which the delivery actually took place.	Optional	Can be entered on this screen or as part of the shipment planning process. This information comes from the driver manifest or the delivery receipt.
Actual Time	Time at which the delivery actually took place.	Optional	Can be entered on this screen or as part of the shipment planning process. This information comes from the driver manifest or the delivery receipt.
POD Name	Name of the person who signed for the delivery.	Optional	Can be entered on this screen or as part of the shipment planning process. This information comes from the delivery receipt.
Actual Set Off	Date on which the product arrived at the agent partner location.	Optional	
Trans Order Number	The order number from the transportation order on which the product was shipped to the agent location.	Display only	Only displayed if the order is associated with a transportation order.
Order Notes	Any notes or additional information that apply to this delivery.	Optional	
Account Instructions	Special instructions that apply to all orders for this account.	Display only	Entered by coordinator on the account's profile. The notes are then copied to every order for this account.
Available Products	List of products that we deliver for this account.	Display only	You can select products from the list and add them to the order. However, you cannot change the list of products on this screen.

Field Name	Description	Field Type	Notes
Selected Products	Products that will be delivered to consignee. Products are selected from the product list.	Optional	
Order Weight	Total weight of all products selected for this order.	Display only	Updated when the order is saved. The weight is calculated based on data in the product table. Product information is entered into the table by the coordinators. The weight is one piece of information added.
Performing Partner	Name of the agent partner that is going to perform the final mile delivery	Display only	
Partner Contact	Name of a person at the performing partner's location who can be contacted about the delivery.	Display only	
Partner Phone	Phone number of partner contact.	Display only	

Field Table: Details II Screen for Final Mile Customer Orders

The following fields are used on the Details II screen for Final Mile Customer orders.

Table 5—Details II screen (final mile customer orders) field definitions

Field Name	Description	Field Type	Notes
Order ID	ID number used to uniquely identify an order in the Home Express system.	Display only	
Customer Name	Name of the account that is shipping products to the consignee.	Display only	
Customer ID	Identification number for the account that is shipping products to the consignee.	Display only	
SCAC ID	SCAC ID for the account that is shipping products to the consignee.	Display only	SCAC is an abbreviation for Standard Carrier Alpha Code. A SCAC ID is a four-character code used to identify the account.
Business Type	Will always show <i>Home Express</i> .	Display only.	
Order Type	Indicates the type of shipment for the order.	Display only	Possible values are: • Final Mile • Final Mile Customer • Returns • Transportation
From Whse	Name of the warehouse from which the product will be picked up.	Optional	
Whse Address	First line of the address of the warehouse from which the product will be picked up.	Optional	
Whse Address, line 2	Second line of the address of the warehouse from which the product will be picked up.	Optional	
From City	City in which the warehouse is located.	Optional	
From State	State in which the warehouse is located.	Optional	

Field Name	Description	Field Type	Notes
From Zip	Zip code of the warehouse.	Optional	
From Country	Country in which the warehouse is located.	Optional	The default value is United States.
Whse Contact	Name of the person at the warehouse who can be contacted about the order.	Display only	
Whse Phone	Phone number of the warehouse contact person.	Optional	
Consignee	Name of person or company the account is shipping product to.	Optional	
Status	Current state of the order.	Optional	Sometimes changed by the system. For example, when you enter the actual date and time of delivery and the POD information, the system changes the status to <i>Delivered</i> . Can also be changed by the operations planning staff. For example, when product arrives at the agent partner location, the operations planner changes the status to <i>Set Off</i> .
Address	First line of the address of the consignee.	Optional	
Address, line 2	Second line of the address of the consignee.	Optional	
City	City of the consignee.	Optional	
State	State of the consignee.	Optional	
Zip	Zip code of the consignee.	Optional	
Country	Country of the consignee.	Optional	The default value is United States.
Contact Name	Name of contact person at the consignee's location. May or may not be the same as the consignee.	Optional	
Phone	Phone number of the contact person.	Optional	

Field Name	Description	Field Type	Notes
BOS Contract	Contract number for this shipment in BOS (Base Operating System)	Optional	
Carrier PRO #	PRO number or other reference number used by the carrier to identify and track a shipment.	Display only	The carrier provides this number.
Acct Ref #	Number, such as a purchase order number or tracking number, used by the account to reference this order. This number is provided by the account.	Optional	
Booking Agent Name	Name of the booking agent for this account.	Display only	
Booker Phone	Phone number of the booking agent contact person.	Display only	
Booker Contact	Name of person at the booking agent location that can be contacted about this account.	Display only	
Freight Available	Estimated date on which the freight will arrive at the provider agent location.	Optional	
Est. Del. Date	Estimated date on which the freight will be delivered to the consignee.	Optional	
Req. Del. Time	Time of day when the consignee would prefer the delivery to take place.	Optional	Req. is an abbreviation for <i>requested</i> , not required.
Scheduled Date	Date that the product will be delivered to the consignee. Assigned by the planner.	Optional	Can be entered on this screen or as part of the shipment planning process.
Final Delivery Time	Time range during which the product will be delivered to the consignee. Assigned by the planner.	Optional	Can be entered on this screen or as part of the shipment planning process.

Field Name	Description	Field Type	Notes
Actual Date	Date on which the delivery actually took place.	Optional	Can be entered on this screen or as part of the shipment planning process. This information comes from the driver manifest or the delivery receipt.
Actual Time	Time at which the delivery actually took place.	Optional	Can be entered on this screen or as part of the shipment planning process. This information comes from the driver manifest or the delivery receipt.
POD Name	Name of the person who signed for the delivery.	Optional	Can be entered on this screen or as part of the shipment planning process. This information comes from the delivery receipt.
Actual Set Off	Date on which the product arrived at the agent partner location.	Optional	
Trans Order Number	The order number from the transportation order on which the product was shipped to the agent location.	Display only	Only displayed if the order is associated with a transportation order.
Order Notes	Any notes or additional information that apply to this delivery.	Optional	
Account Instructions	Special instructions that apply to all orders for this account.	Display only	Entered by coordinator on the account's profile. The notes are then copied to every order for this account.
Available Products	List of products that we deliver for this account.	Display only	You can select products from the list and add them to the order. However, you cannot change the list of products on this screen.
Selected Products	Products that will be delivered to consignee. Products are selected from the product list.	Optional	
Order Weight	Total weight of all products selected for this order.	Display only	Updated when the order is saved. The weight is calculated based on data in the product table. Product information is entered into the table by the coordinators. The weight is one piece of information added.

Field Name	Description	Field Type	Notes
Performing Partner	Name of the agent partner that is going to perform the final mile delivery	Display only	
Partner Contact	Name of a person at the performing partner's location who can be contacted about the delivery.	Display only	
Partner Phone	Phone number of partner contact.	Display only	

Field Table: Details II Screen for Returns Orders

The following fields are used on the Details II screen for Returns orders.



The product that is being returned from a consignee to the agent partner location is not listed on the Details II screen. If you would like to see the list of products being returned, click on the **Inventory Summary** tab.

Table 6—Details II screen (returns orders) field definitions

Field Name	Description	Field Type	Notes
Order ID	ID number used to uniquely identify an order in the Home Express system.	Display only	
Customer Name	Name of the account that originally shipped the products to the consignee.	Display only	
Customer ID	Identification number for the account that originally shipped the products to the consignee.	Display only	
SCAC ID	SCAC ID for the account that originally shipped the products to the consignee.	Display only	SCAC is an abbreviation for Standard Carrier Alpha Code. A SCAC ID is a four-character code used to identify the account.
Business Type	Will always show <i>Home Express</i> .	Display only.	
Order Type	Indicates the type of shipment for the order.	Display only	Possible values are: • Final Mile • Final Mile Customer • Returns • Transportation
Consignee	Name of person or company the account originally shipped product to.	Optional	
Address	First line of the address of the consignee.	Optional	
Address, line 2	Second line of the address of the consignee.	Optional	

Field Name	Description	Field Type	Notes
City	City of the consignee.	Optional	
State	State of the consignee.	Optional	
Zip	Zip code of the consignee.	Optional	
Country	Country of the consignee.	Optional	The default value is United States.
Contact Name	Name of contact person at the consignee's location. May or may not be the same as the consignee.	Display only	
Phone	Phone number of the contact person.	Optional	
To Name	Name of the agent partner location to which the returned product will be delivered.	Optional	
Status	Current state of the order.	Optional	Sometimes changed by the system. For example, when you enter the actual date and time of delivery and the POD information, the system changes the status to <i>Delivered</i> . Can also be changed by the operations planning staff. For example, when product arrives at the agent partner location, the operations planner changes the status to <i>Set Off</i> .
To Address	First line of the address of the agent partner location to which the returned product will be delivered.	Optional	
To Address, line 2	Second line of the address of the agent partner location to which the returned product will be delivered.	Optional	
To City	City in which the destination agent partner is located.	Optional	
To State	State in which the destination agent partner is located.	Optional	

Field Name	Description	Field Type	Notes
To Zip	Zip code of the destination agent partner.	Optional	
To Country	Country in which the destination agent partner is located.	Optional	The default value is United States.
Contact Name	Name of the person at the destination agent partner location who can be contacted about the order.	Display only	
Phone	Phone number of the contact person at the destination agent partner location.	Optional	
Cust Ref #	Number, such as a purchase order number or tracking number, used by the account to reference this order. This number is provided by the account.	Optional	
Weight	Total weight of all products that are being returned on this order.		
Location of Product	Location in the agent partner's warehouse where the returned product will be stored.		
BOS Contract	Contract number for this shipment in BOS (Base Operating System)	Optional	
Freight Available	Estimated date on which the freight will arrive at the provider agent location.	Optional	
Est. Del. Date	Estimated date on which the freight will be delivered to the consignee.	Optional	
Req. Del. Time	Time of day when the consignee would prefer the delivery to take place.	Optional	Req. is an abbreviation for <i>requested</i> , not required.

Field Name	Description	Field Type	Notes
Scheduled Date	Date that the product will be picked up at the consignee location. Assigned by the planner.	Optional	Can be entered on this screen or as part of the shipment planning process.
Scheduled Time	Time range during which the product will be picked up at the consignee location. Assigned by the planner.	Optional	Can be entered on this screen or as part of the shipment planning process.
Actual Date	Date on which the pickup actually took place.	Optional	Can be entered on this screen or as part of the shipment planning process. This information comes from the driver manifest or the delivery receipt.
Actual Time	Time at which the pickup actually took place.	Optional	Can be entered on this screen or as part of the shipment planning process. This information comes from the driver manifest or the delivery receipt.
POD Name	Name of the person who signed for the pickup.	Optional	Can be entered on this screen or as part of the shipment planning process. This information comes from the delivery receipt.
Actual Set Off	Date on which the product arrived at the agent partner location.	Optional	
Order Notes	Any notes or additional information that apply to this pickup.	Optional	
Account Instructions	Special instructions that apply to all orders for this account.	Display only	Entered by coordinator on the account's profile. The notes are then copied to every order for this account.
Performing Partner	Name of the agent partner that is going to perform the final mile delivery	Display only	
Partner Contact	Name of a person at the performing partner's location who can be contacted about the delivery.	Display only	
Partner Phone	Phone number of partner contact.	Display only	

Field Table: Details II Screen for Transportation Orders

The following fields are used on the Details II screen for Transportation orders.

Table 7—Details II screen (transportation orders) field definitions

Field Name	Description	Field Type	Notes
Order ID	ID number used to uniquely identify an order in the Home Express system.	Display only	
Customer Name	Name of the account that is shipping products.	Display only	
Customer ID	Identification number for the account that is shipping products.	Display only	
SCAC ID	SCAC ID for the account that is shipping products.	Display only	SCAC is an abbreviation for Standard Carrier Alpha Code. A SCAC ID is a four-character code used to identify the account.
Business Type	Will always show <i>Home Express</i> .	Display only.	
Order Type	Indicates the type of shipment for the order.	Display only	Possible values are: • Final Mile • Final Mile Customer • Returns • Transportation
From Location	Name of the warehouse from which the product will be picked up.	Display only	
From Address	First line of the address of the warehouse from which the product will be picked up.	Optional	
From Address, line 2	Second line of the address of the warehouse from which the product will be picked up.	Optional	
From City	City in which the origin warehouse is located.	Optional	
From State	State in which the origin warehouse is located.	Optional	

Field Name	Description	Field Type	Notes
From Zip	Zip code of the origin warehouse.	Optional	
From Country	Country in which the origin warehouse is located.	Optional	Default value is United States.
From Contact	Name of the person at the origin warehouse who can be contacted about the order.	Display only	
From Phone	Phone number of the origin warehouse contact person.	Optional	
To Location	Name of the agent partner location to which the product will be delivered.	Display only	
Status	Current state of the order.	Optional	Sometimes changed by the system. Can also be changed by the operations planning staff. For example, when product arrives at the agent partner location, the operations planner changes the status to <i>Set Off</i> .
To Address	First line of the address of the agent partner location to which the product will be delivered.	Optional	
To Address, line 2	Second line of the address of the agent partner location to which the product will be delivered.	Optional	
To City	City in which the destination agent partner is located.	Optional	
To State	State in which the destination agent partner is located.	Optional	
To Zip	Zip code of the destination agent partner.	Optional	
To Country	Country in which the destination agent partner is located.	Optional	The default value is United States.

Field Name	Description	Field Type	Notes
Contact Name	Name of the person at the destination agent partner location who can be contacted about the order.	Display only	
Phone	Phone number of the contact person at the destination agent partner location.	Optional	
Actual Set Off	Date on which the shipment arrived at the destination agent partner location.	Optional	
Carrier Ref #	PRO number or other reference number used by the carrier to identify and track a shipment.	Display only	The carrier provides this number.
Load Date	Estimated date on which the product will be loaded at the origin location.	Optional	
Delivery Date	Estimated date on which the product will be delivered to the origin location.	Optional	
Weight	Total weight of the product on the shipment.	Optional	
BOS Contract	Contract number for this shipment in BOS (Base Operating System)	Optional	
Order Notes	Any comments or other notes that apply to this order.	Optional	
Account Instructions	Special instructions that apply to all orders for this account.	Display only	Entered by coordinator on the account's profile. The notes are then copied to every order for this account.

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Main Account Details I Details II Call Sheet Partner Rates Activities Inventory Summary Invoice

Order ID: 3204

Details II

Customer Name: Acme Home Furnishings Customer ID: 241 SCAC ID: ACHF Business Type: Home Express

Order Type: Transportation

From Location: Main Warehouse

From Address: 8542 Junipur Road

From City: Duluth

From State: Minnesota

From Zip: 55816

From Country: United States

From Contact: Tom Holmes

From Phone: (555) 888-3652

To Location: Status: Open

To Address: 432 Peterson Drive

To City: Duluth

To State: Minnesota

To Zip: 55189

To Country: United States

Contact Name: Henry Davids

Phone: (555) 986-5214

Actual Setoff:

Order Notes:

Account Instructions:

View Attachments

Survey History **Comments** Save

1. Click **Comments**.

Figure 22—Lower portion of Details II screen

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Main Account Details I Details II Call Sheet Partner Rates Activities Inventory Summary Invoice

Order ID: 3204

Home Express - Order Comments Results

Customer Name: Acme Home Furnishings Customer ID: 241 SCAC ID: ACHF Business Type: Home Express

No Comments Available.

Add New Comment

2. Click **Add New Comment**.

Figure 23—Order Comments Results screen

Instructions: Adding or Reviewing Comments to an Order

Use the steps below to add or review comments.



These steps assume that you are on the **Details II** screen of the order for which you want to add comments. If you are not on the **Details II** screen, select an order and go to the **Details II** screen before beginning these steps.

1. At the bottom of the **Details II** screen, click **Comments**.
The system displays the **Order Comment Results** screen.
2. Click **Add New Comment**.
The system displays the **Add/View Order Comment** screen. The system enters your user ID and the current date automatically.

Continue with the steps on the next page.

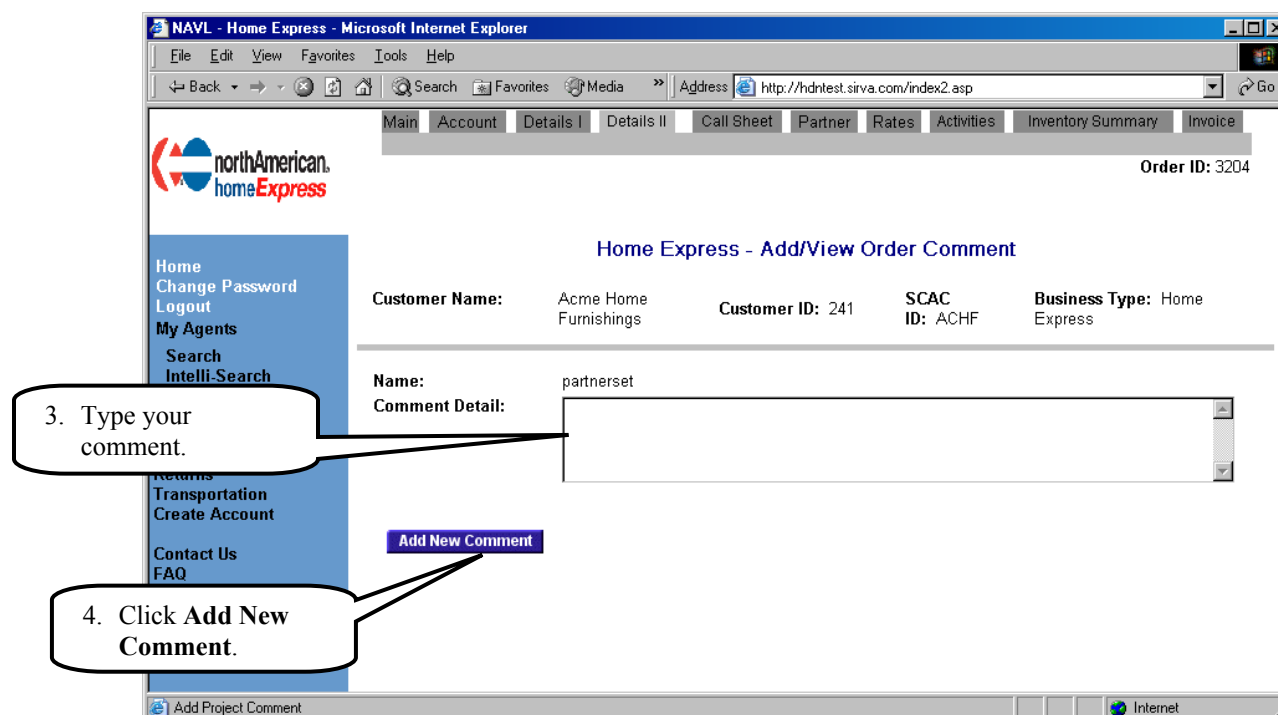


Figure 24—Add/View Order Comment screen

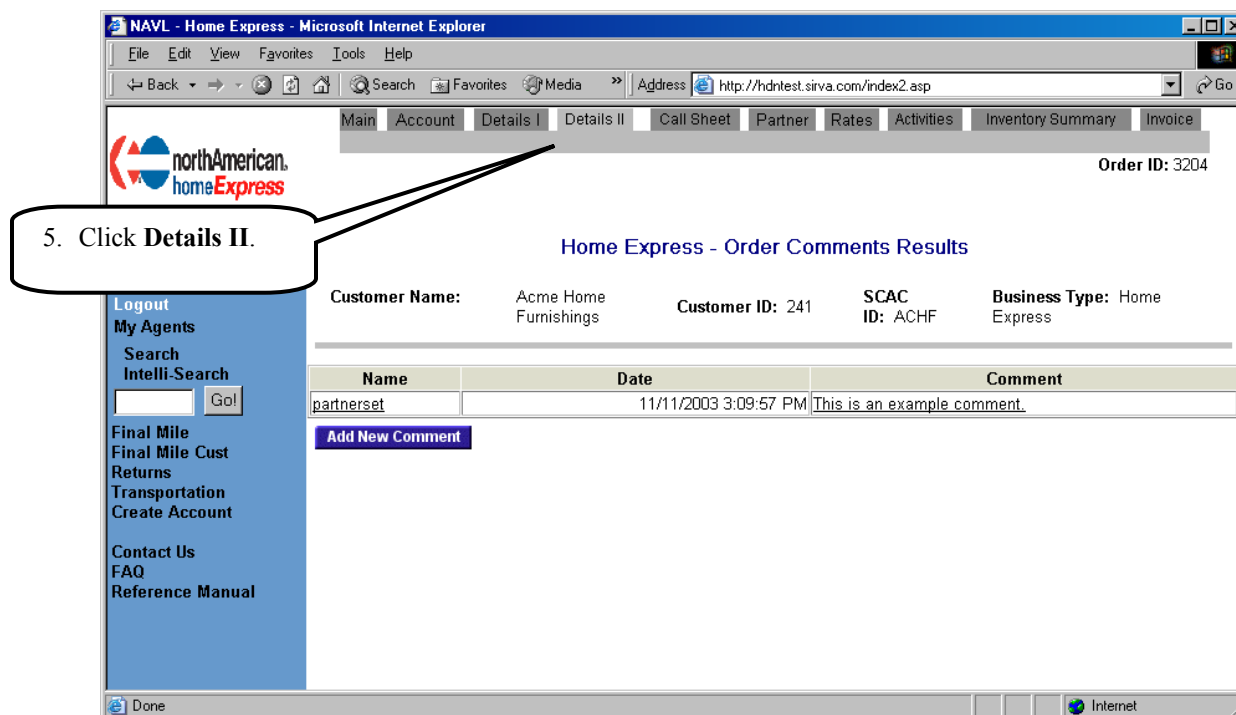


Figure 25—Order Comments Results screen

- Click in the *Comment Detail* field and then type your comment.



Notice that the system enters your name automatically when you create a comment.

- To save your changes, click **Add New Comment**.
The system displays the **Order Comment Results** screen.
- At the top of the screen, click **Details II**.
The system displays the **Details II** screen.

Field Table: Add/View Order Comment Screen

The following fields are used on the Add/View Order Comment screen.

Table 8—Add/view comments field definitions

Field Name	Description	Field Type	Notes
Order ID	ID number used to uniquely identify an order in the Home Express system.	Display only	
Customer Name	Name of the business that we deliver products for.	Display only	
Customer ID	ID number assigned by the Home Express system to the account. Used to identify the account in Home Express.	Display only	
SCAC ID	SCAC ID for the account that is shipping the products to the consignee.	Display only	SCAC is an abbreviation for Standard Carrier Alpha Code. A SCAC ID is a four-character code used to identify the account.
Business Type	Will always show <i>Home Express</i> .	Display only.	
Name	User ID of the person who entered the comment.	Display only.	
Date	Date on which the comment was entered.	Display only.	
Comment	Text or other information that was entered on the add comment screen.	Display only.	

The screenshot shows a web browser window titled "Home Express - Microsoft Internet Explorer". The address bar displays "http://hdntest.sirva.com/index2.asp". The browser's menu bar includes File, Edit, View, Favorites, Tools, and Help. The toolbar contains Back, Forward, Home, Search, Favorites, Media, and a Go button. The page content is divided into several sections:

- Navigation Tabs:** Main, Account, Details I, Details II, Call Sheet, Partner, Accessorials, Activities, Inventory Summary, Invoice.
- Header:** Home Express logo, "<< Prev Next >>" navigation links, and "Order ID: 3135".
- Left Sidebar:** A blue sidebar with links for Home, Change Password, Logout, Search, Intelli-Search (with a search box containing "03135" and a "Go!" button), Administration (with sub-links: Admin Tool, Cash Application, Final Mile, Final Mile Cust, Returns, Transportation, Create Account, Create Partner, Reports, View Invoices), and Contact Us (with sub-links: FAQ, Reference Manual, Reports Reference).
- Main Content Area:**
 - Home Express - On Site Survey Results**
 - Customer Information:**
 - Customer Name:** Furniture Warehouse
 - Customer ID:** 215
 - SCAC ID:** FWCA
 - Contact:** 1798 West Second St. Pomona, CA 91766
 - Main Phone:** 909-865-0030
 - Main Fax:** 909-000-0000
 - Business Type:** Home Express
 - Survey Results Table:**

Question	Response
Are you satisfied with the service of our delivery team?	Yes
Are you staisfied that the item was delivered with no damage?	Yes
Would you recommend our service to your friends?	Yes

Figure 26—On Site Survey Results screen

Instructions: Reviewing Survey Results

The **Survey Results** screen lists the answers given by the customer to standard survey questions. The survey allows us to track metrics about customer satisfaction. You cannot change any of the information on the survey screen.

After reviewing the information, go to the top of the screen and click the **Details II** tab.

Field Table: On Site Survey Results Screen

The following fields are used on the Survey Results screen.

Table 9—On Site Survey Results field definitions

Field Name	Description	Field Type	Notes
Order ID	ID number used to uniquely identify an order in the Home Express system.	Display only	
Customer Name	Name of the account that is shipping products to the consignee.	Display only	
Customer ID	Identification number for the account that is shipping the products.	Display only	
SCAC ID	SCAC ID for the account that is shipping products to the consignee.	Display only	SCAC is an abbreviation for Standard Carrier Alpha Code. A SCAC ID is a four-character code used to identify the account.
Contact Name	Name of contact person at the account's location.	Display only	
Address	Address of the account.	Display only	
Main Phone	Primary phone number, used to contact the account contact.	Display only	
Main Fax	Phone number to which faxed information is sent.	Display only	
Business Type	Will always show <i>Home Express</i> .	Display only.	
Question	Question asked of the customer to gauge their satisfaction with the delivery of product.	Display only	
Response	Answer given by the customer to the question.	Display Only	

NAVL - Home Express - Microsoft Internet Explorer

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Main Account Details I Details II Call Sheet Partner Rates Activities Inventory Summary Invoice

Order ID: 3204

Details II

Customer Name: Acme Home Furnishings Customer ID: 241 SCAC ID: ACHF Business Type: Home Express

Order Type: Transportation

From Location: Main Warehouse

From Address: 8542 Junipur Road

From City: Duluth

From State: Minnesota

From Zip: 55816

From Country: United States

From Contact: Tom Holmes

From Phone: (555) 888-3652

To Location: Open

To Address: 432 Peterson Drive

To City: Duluth

To State: Minnesota

To Zip: 55189

To Country: United States

Contact Name: Henry Davids

Phone: (555) 986-5214

Actual Setoff:

Order Notes:

Account Instructions:

View Attach Orders

Survey History Comments Save

Figure 27—Details II screen

Home Express - Microsoft Internet Explorer

File Edit View Favorites Tools Help

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Main Account Details I Details II Call Sheet Partner Accessorials Activities Inventory Summary Invoice

Order ID: 3135

Home Express - Order History

Order	CreateDate	CreatedBy	Comment	Name	CreatedBy	CreateDate	OriginalDate	Origin
10/02/2003	WISET							

Figure 28—Left portion of the History screen

Instructions: Reviewing Order History

The Order History screen displays information about changes that are made to an order. Whenever a change is made, the system records the date and the user ID of the person making the change. The system also records information such as the reason for changing a date and the original date.

All of the information is recorded so that the coordinators and other people involved with a shipment know what is going on with the shipment. The user ID of the person changing a shipment is especially important. If someone has a question about a shipment change, they can contact the person who made the change for clarification.

The information on this screen divided into three sections: order creation information, comment information, and changed dates information.

After reviewing the information, go to the top of the screen and click the **Details II** tab.

Field Table: On Site Survey Results Screen

The following fields are used on the Order History screen.

Table 10—Order History screen field definitions

Field Name	Description	Field Type	Notes
Order ID	ID number used to uniquely identify an order in the Home Express system.	Display only	
Order			
Create Date	Date on which the order was originally created.	Display only	
Created By	User ID of the who created the order	Display only	
Comment			
Comment	Comment that was added to the order.	Display only	
Name	User ID of the person who added the commented.	Display only	
Created By		Display only	
Create Date	Date on which the comment was added.	Display only	
Date Changes			
Original Date	Date before the change was made.	Display only	
Original Time	Time before the change was made	Display only	
Changed To Date	Date after the change.	Display only	
Changed To Time	Time after the change.	Display only	
Reason Code		Display only	
Description		Display only	
Comments		Display only	
Modified By	User ID of the person who made the change.	Display only	
Modified Date	Date on which the change was made.	Display only	
Date Time Change		Display only	

1. Click Activities.

2. Review the activities.

Order ID: 3202

Receiving and Activities Report

Order Name: Larry Jones **Order ID:** 3202 **SCAC ID:** ACHF
Account Name: Acme Home Furnishings **Account ID:** 241 **NA ID:** 1253
Partner Name: XYZ Transportation **Partner ID:** 228 **NADS ID:** N/A
Business Type: Home Express

Date	Created By	Last Modified By	Desc.	Billed	Units	Partner Rate	Report No.
11/11/2003	partnerset	partnerset	<u>Delivery Charge</u>	No	1.00 FR	\$150.00/FR	

[Partner Invoice](#)

Figure 29—Receiving and Activities Report screen

Instructions: Using the Receiving and Activities Report

The **Receiving and Activities Report** screen allows you to see the activities that were performed for each order. It also allows you to see any accessorials or other activities that have been added by a coordinator. For example, if the delivery required extra labor, the coordinator would add the activity and you would review it on this screen.



These steps assume that you are on the **Details II** screen or the **Call Sheet** for the order. If you are not on one of those screens, select an order and go to the **Details II** or **Call Sheet** screen now.

1. Click the **Activities** tab.

The system displays the **Receiving and Activities Report** screen.

2. Review the activities for the order.



In the future, a booking agent might be able to add activities to an order. At this time, no one can activities to an order. If you need to add an activity, please call your coordinator.

Field Table: Add Activity Screen

The following fields are used on the Add Activity screen.

Table 11—Add Activity screen field definitions

Field Name	Description	Field Type	Notes
Order Name	Name of the business that we deliver products for.	Display only	
Order ID	ID number used to uniquely identify an order in the Home Express system.	Display only	
SCAC ID	SCAC ID for the account that is shipping the products to the consignee.	Display only	SCAC is an abbreviation for Standard Carrier Alpha Code. A SCAC ID is a four-character code used to identify the account.
Account Name	Name of the business that we deliver products for.	Display only	
Account ID	ID number assigned by the Home express system to the account. Used to identify the account in Home Express.	Display only	
NA ID	ID number assigned by North American Van Lines to the account. It is used to identify the account.	Display only	NA is an abbreviation for North American.
Partner Name	Name of the agent partner that is delivering product for this order.	Display only	
Partner ID	ID number used to uniquely identify an agent partner in the Home Express system.	Display only	
NADS ID	ID number assigned by North American Distribution Services to the account. It is used to identify the account.	Display only	NADS is an abbreviation for North American Distribution Services.
Business Type	Will always show <i>Home Express</i> .	Display only.	
Date	Date on which the activity was performed.	Display only	

Created By	User ID of the person who entered the activity.	Display only	
Last Modified By	User ID of the last person who made changes to the order.	Display only	
Description	Description of the activity performed for the order.	Display only	
Billed	Yes or No field used to indicate whether or not the activity is billed to the customer account.	Display only	
Units	Multiplier used to indicate the number of times the rate should be applied to this order.	Display only	The units must correspond to the unit of measure. For example, a rate for extra labor might use the <i>hours</i> unit of measure, such as \$20 per hour. In that case, the units would be the number of hours of extra labor performed. If you performed 2 hours of extra labor, you would type 2 in the units field. When the system calculates the charge for the accessorial, the calculation would be 2 X \$20 = \$40. Possible units of measure are: • 100 Weight • Dollars • Flat Rate • Hour • Pallet • Pounds • Unknown
Partner Rate	Amount that will be paid to the agent partner for performing the activity.	Display only	
Report No.	Number of the receiving report on which inventory was listed/ received.	Display only	Will always be blank. The receiving report option is no longer used.

1. Click **Inventory Summary**.

2. Review the inventory information.

3a. Change line item status.

3b1. Click the letter C.

The screenshot shows the 'Inventory Summary' screen for Order ID: 2073. The account is 'Joe's Discount Computer Store' (Account ID: 217, NADS ID: JDCS) and the consignee is 'Mary Jones' (Order ID: 2073, Business Type: Home Express). A table lists inventory items, including a 'Monitor' with a line item status dropdown set to 'In'. An 'Update Inventory' button is at the bottom.

Figure 30—Inventory Summary screen

3b2. Type your comment.

3b3. Click **Add New Comment**.

3b4. Select an option.

The screenshot shows the 'Home Express - Comments' screen for Order ID: 3203. It displays order details for 'Acme Home Furnishings' (Part# 53576) and a comment entry form. The comment is dated 11/11/2003 and reads: 'I have contacted the account for a disposition.' An 'Add New Comment' button is visible.

Figure 31—Adding an inventory comment

Instructions: Using the Inventory Summary

The **Inventory Summary** screen is only used with returns orders. Partners are required to keep track of the inventory that is returned to their location. The system helps keep track of the inventory by automatically recording the inventory that is part of a returns order.

If the inventory is usable, it can be used to fulfill another order for the account. If the inventory is broken or unusable, the account determines whether it is repairable or should be scrapped.

Use the steps below to review the inventory summary for an order.



These steps assume that you are on the **Details II** screen or the **Call Sheet** for the order. If you are not on one of those screens, select a returns order and go to the **Details II** screen now.

1. Click the **Inventory Summary** tab.
The system displays the **Inventory Summary** screen.
2. Review the inventory information.
3. Change information as needed:
 - a. Change the line item status:
 - 1) Select a new status from the **Line Item Status** drop-down list.
 - 2) Click **Update Inventory**.

- b. Add comments:



The Comments screen is also used to review existing comments.

- 1) In the **Comments/Exceptions** column, click the letter **C**.
The system displays the **Comments** screen.



When you add a comment, the system records your user ID automatically.

- 2) In the *Comments* field, type your comments.
 - 3) Click **Add New Comment**.
The system saves the comment and displays it in the comment list at the bottom of the screen.
 - 4) To return to the **Inventory Summary** screen, click **Inventory Summary** at the bottom of the screen.

NAVL - Home Express - Microsoft Internet Explorer

Address: http://hdntest.sirva.com/index2.asp

Order ID: 2073

Inventory Summary

Account Name: Joe's Discount Computer Store Account ID: 217 NADS ID: JDCS
 Consignee Name: Mary Jones Order ID: 2073 Business Type: Home Express

Account	Account Part No	Description	Line Item Status	Pieces	Pieces Expected	Pieces On Hand	Pieces Shipped	Exceptions	Initial Weight (lbs)	Weight On Hand (lbs)	Comments
Joe's Discount Computer Store	8521	Monitor	In	1	0	2	0	2	32	32	C E
Order Total:				1	0	2	0	2	32	32	

Update Inventory

3c1. Click the letter E.

Figure 32—Inventory Summary screen

NAVL - Home Express - Microsoft Internet Explorer

Address: http://hdntest.sirva.com/index2.asp

Order ID: 2073

Exception Report

Order ID: 2073 Account ID: 217

Part#	Account Name	Description	UNKS		Weight(lb.)	Location
			OH	Rec		
8521	Joe's Discount Computer Store	Monitor	2	1	32	10101

Reason:
 Date:
 Number of Pieces:
 Weight: LB(s)
 Description:

Add Exception

Exception List:

ID	Reason	Pieces	Weight (LBs)	Description
1	Received	N/A	16	This is a test.
1	Recounted/Found	+	16	When we did the inventory, we found an additional monitor.

Inventory Summary Back to Activity Results Add New Activity

3c2. Select a reason.
 3c3. Type the date.
 3b4. Type the number of pieces.
 3b5. Type the weight.
 3b6. Type the description.
 3b7. Click Add Exception.

Figure 33—Adding an inventory exception

c. Add Exceptions:



The Exception Report screen is also used to review existing exceptions.

- 1) In the **Comments/Exceptions** column, click the letter **E**.

The system displays the **Exception Report** screen.

- 2) Select an exception reason from the **Reason** drop-down list.



Notice that each reason in the list includes a plus sign (+), a minus sign (-), or the letters N/A. These characters indicate how each reason affects inventory piece counts. A plus sign indicates that the piece count will increase. A minus sign indicates that the piece count will decrease. The letters N/A indicate that the piece count will not change.

- 3) In the *Date* field, type the date for the exception.

- 4) In the *Number of Pieces* field, type the number of pieces that are affected by the exception.

- 5) In the *Weight* field, type the total weight of the pieces.



Calculate the total weight of the items to which the exception applies. For example, if you enter an exception because you recovered 2 stolen items that weigh 10 pounds each, you would enter 20 in the weight field.

- 6) In the *Description* field, type additional information about the exception.

- 7) Click **Add Exception**.

The system adds the exception to the list at the bottom of the screen.

- 8) To return to the **Inventory Summary** screen, click **Inventory Summary** at the bottom of the screen.

Field Table: Inventory Summary Screen

The following fields are used on the Inventory Summary screen.

Table 12—Inventory Summary screen field definitions

Field Name	Description	Field Type	Notes
Account Name	Name of the business that the partner delivers product for.	Display only	
Account ID	ID number assigned by the Home Express system to the account. Used to identify the account in Home Express.	Display only	
NADS ID	ID number assigned by North American Distribution Services to the account. It is used to identify the account.	Display only	NADS is an abbreviation for North American Distribution Services.
Consignee Name	Name of person or company the account is shipping product to.	Display only	
Order ID	ID number used to uniquely identify an order in the Home Express system.	Display only	
Account Type	Will always show “Home Express”	Display only	
Business Type	Will always show <i>Home Express</i> .	Display only.	
Account	Name of the company that originally shipped the product to the consignee.	Display only	
Account Part Number	Number used to uniquely identify the part. The vendor assigns this number.	Display only	
Description	Text describing the part.	Display only	
Line Item Status	Current status of the product listed on this line of the summary.	Display only	Possible values are expected, in, or out.

Field Name	Description	Field Type	Notes
Pieces	Quantity of this part that has been received as part of this returns order.	Display only	The number in this field will be 0 (zero) until the items are received at the agent partner location.
Pieces Expected	Quantity of this part that will be received on a future returns order.	Display only	This number is based on returns orders in the system. If the returns order hasn't been entered yet, the quantity is not included in the total.
Pieces On Hand	Quantity of this part that is currently located in the agent partner's warehouse/location	Display only	This number is incremented when you change the inventory status from Expected to In. It is decremented when you change the status from In to Out.
Pieces Shipped	Quantity of this part that are being shipped from out of the agent partner location	Display only	This number is updated when you change the inventory status to Out.
Exceptions	Lists the number of exceptions that have been entered into the system for this product.	Display only	For example, if an inventory piece were damaged while in the warehouse, an exception would be entered. The number of exceptions would be incremented by one.
Initial Weight	Lists the total weight of the inventory.	Display only	Enter the weight in pounds.
Weight on Hand	Lists the total weight of the inventory that is still in the warehouse.	Display only	When returned inventory is reused or sent back to the supplier, it is removed from inventory. When it is removed, the weight on hand is decreased. Enter the weight in pounds.
Comments/ Exceptions	Links to other screen which contain information about the inventory items.	Optional	Lists two options, next to each inventory item. The letter C is a link that takes to you the comment screen for the inventory item. The letter E is a link that takes you to the Exceptions screen for the inventory item.

Field Table: Inventory Comments Screen

The following fields are used on the Inventory Comments screen.

Table 13—Inventory Comments screen field definitions

Field Name	Description	Field Type	Notes
Order ID/ Order No.	ID number used to uniquely identify an order in the Home Express system.	Display only	
Consignee Name	Name of person or company the account is shipping product to.	Display only	
Report No.	Number of the receiving report on which the product was received.	Display only	Currently, receiving reports are not used in Home Express. They might be used in the future, so this field was placed on this screen.
Account PO	Purchase Order number used by the account when shipping this product to the agent partner.	Display only	This is only displayed if the product is received on a receiving report instead of a returns order.
Carrier	Carrier that delivered the product to the agent partner.	Display only	This is only displayed if the product is received on a receiving report instead of a returns order.
Bill of Lading No.	Bill-of-lading number used by the carrier to track the shipment of product to the agent location	Display only	This is only displayed if the product is received on a receiving report instead of a returns order.
Date Received	Calendar date on which the product was received at the agent location	Display only	This is only displayed if the product is received on a receiving report instead of a returns order.
Received By	Name of the person who received the product.	Display only	This is only displayed if the product is received on a receiving report instead of a returns order.
Part #	Number used to uniquely identify the part. The vendor assigns this number.	Display only	

Field Name	Description	Field Type	Notes
Account Name	Name of the business that we deliver products for.	Display only	
Item Description	Description of the product that was returned.	Display only	
Name	Name of the person entering the comments.	Display only	
Date	Date on which the comments were entered.	Display only	
Comments	Comments or other information about the returned product.	Required	Free-form text; it does not have to be entered in any specific format.

Field Table: Inventory Exception Report Screen

The following fields are used on the Inventory Exception Report screen.

Table 14—Inventory Exception Report field definitions

Field Name	Description	Field Type	Notes
Order ID.	ID number used to uniquely identify an order in the Home Express system.	Display only	
Account ID	ID number assigned by the Home Express system to the account. Used to identify the account in Home Express.	Display only	
Part #	Number used to uniquely identify the part. The vendor assigns this number.	Display only	
Account Name	Name of the business that we deliver products for.	Display only	
Description	Description of the product that is being returned.	Display only	
OH (On Hand)	Quantity of the product that is currently on hand at the agent partner location.	Display only	
Rec (Received)	Quantity of the product received on the returns order you are currently reviewing.	Display only	
Weight	Total weight of the product currently on hand.	Display only	Weight is displayed in pounds.
Location	Location in the agent partner's warehouse where the product is stored.	Display only	Refers to the product on the order you are reviewing. Other product, received on previous returns orders, might be stored elsewhere.
Reason	Selection list of possible reasons why you are entering an exception.	Required	It is very important that the reason for the exception is accurate. Exceptions affect inventory counts. If you choose the wrong reason, the inventory might be updated incorrectly.

Field Name	Description	Field Type	Notes
Date	Date on which the exception was entered.	Required	
Number of pieces	Number of pieces affected by the exception	Required	It is very important that the number of pieces is accurate. This number is used to update inventory counts. Some exceptions increase inventory while other decrease it.
Weight	Total weight of the pieces affected by the exception.	Required	
Description	Comments or other information about the exception you are entering.	Required	Free-form text; it does not have to be entered in any specific format.

1. Click **Invoice**.

2. Click **Partner Invoice** or **Project Invoice**.

3. Review the information.

NAVL - Home Express - Microsoft Internet Explorer

Address: http://hdntest.sirva.com/index2.asp

Order ID: 3202

Home Express - Partner Invoice

Partner Invoice ☒ Order Invoice ☐

Order Name: Larry Jones Order ID: 3202 SCAC ID: ACHF
 Account Name: Acme Home Furnishings Account ID: 241 NA ID: 1253
 Partner Name: XYZ Transportation Partner ID: 228 NADS ID: N/A
 Business Type: Home Express

Date	Desc.	Billed	Units	Partner Rate	Do Not Pay	Invoice ID
11/11/2003	Delivery Charge	No	1.00 FR	\$150.00/FR	☐	

[Back to Project Profile](#)

Intelli-Search: A - Account, P - Partner, O - Order, I - Invoice, R - Acct Ref #

Figure 34—Partner Invoice screen

Instructions: Using the Partner Invoice Screen

The **Partner Invoice** screen lists the activities performed by the agent partner on an order. It also lists the date of the activities; the charge for the activity; and the partner invoice number after the invoice has been processed.

This screen shows two option buttons, which are used to select different views. The **Partner Invoice** view shows the payments that the agent partner will receive for each activity. The **Order Invoice** view shows the amounts that the account will be billed for each activity.



These steps assume that you are on the **Details II** screen or the **Call Sheet** for the order. If you are not on one of those screens, select an order now.

Use the steps below to review the Partner Invoice for an order.

1. Click the **Invoice** tab.
The system displays the **Partner Invoice** screen.
2. To switch between views, click the selection button next to *Partner Invoice* or *Order Invoice*.
3. Review the information.

Field Table: Partner Invoice Screen

The following fields are used on the Partner Invoice screen.

Table 15—Partner Invoice screen field definitions

Field Name	Description	Field Type	Notes
Invoice Selection buttons	Allow you to select between two views of invoice information.	Optional	Default is <i>Partner Invoice</i> . Choices are: • Partner Invoice • Order Invoice
Order Name	Name of consignee for this order.	Display only	
Order ID	ID number used to uniquely identify an order in the Home Express system.	Display only	
SCAC ID	SCAC ID for the account that is shipping products to the consignee.	Display only	<i>SCAC</i> is an abbreviation for Standard Carrier Alpha Code. A SCAC ID is a four-character code used to identify the account.
Account Name	Name of the business that the partner delivers product for.	Display only	
Account ID	ID number assigned by the Home Express system to the account. Used to identify the account in the system.	Display only	
NA ID	ID number assigned by North American Van Lines to the account. It is used to identify the account.	Display only	NA is an abbreviation for North American.
Partner Name	Name of the agent partner that is delivering product for the account.	Display only	
Partner ID	ID number used to uniquely identify an agent partner in the Home Express system.	Display only	
NADS ID	ID number assigned by North American Distribution Services to the account. It is used to identify the account.	Display only	NADS is an abbreviation for North American Distribution Services.

Field Name	Description	Field Type	Notes
Business Type	Will always show <i>Home Express</i> .	Display only.	
Date	Date on which the service or activity was performed.	Display only	
Description	Text describing the service or activity that was performed.	Display only	
Billed	Indicates whether the activity or service has been billed to the account.	Display only	Possible values are: • Yes • No
Units	Multiplier used to indicate the number of times the rate should be applied to this order.	Display only	The units must correspond to the unit of measure. For example, a rate for extra labor might use the <i>hours</i> unit of measure, such as \$20 per hour. In that case, the units would be the number of hours of extra labor performed. If you performed 2 hours of extra labor, you would type 2 in the units field. When the system calculates the charge for the accessorial, the calculation would be 2 X \$20 = \$40. Possible units of measure are: • 100 Weight • Dollars • Flat Rate • Hour • Pallet • Pounds • Unknown
Partner Rate	Dollar amount that the partner will be paid for the service or activity.	Display only	
Do Not Pay	Check box indicating that the activity		
Invoice ID	Number used to uniquely identify an invoice in the Home Express system.	Display only	Assigned automatically by the system when invoice is processed.

Conclusion

The Details II screen, the Call Sheet, and the other information screens are used to review and change order information. They give you easy access to order data so that you always know the status of your orders without having to call the Fort Wayne coordinator.

Searching for Information

Description

Searching enables you to find information in the Home Express system. You can search for partners, accounts, orders, invoices, or account reference numbers. There are two types of searches built into Home Express: the *Standard Search* and the *Intelli-Search*.

The standard search allows you to be very detailed when searching. However, it takes more time and requires that you enter more data. The Intelli-Search is faster, but is not as detailed as the standard search. Use whichever search option gives you the results you are looking for. Often, users try the Intelli-Search first and, if it doesn't display the results needed, they try the standard search.

The screenshot shows a web browser window titled "NAVL - Home Express - Microsoft Internet Explorer" with the address bar displaying "http://hdntest.sirva.com/index2.asp". The main content area is titled "Home Express - Find Accounts/Orders".

On the left side, there is a vertical navigation menu with the following links: "Change Password", "Logout", "My Agents", "Search", "Final Mile", "Final Mile Cust", "Returns", "Transportation", and "Create Account".

The main search area is divided into two sections by a dashed red line. The top section is for searching by name or number, with a "Search for" dropdown set to "Order" and a "by" dropdown set to "Home Express ID". Below these is a text input field and a "Go!" button. A callout bubble points to the "Go!" button, stating: "When you search by name or number, use this Go button."

The bottom section is for searching by geographical area, with radio buttons for "Account" and "Partner" (selected). Below these are input fields for "Proximity:" (with a "(miles)" label), "Address:", "City:", "State:" (set to "AK"), and "Zip:". A callout bubble points to the "Go!" button, stating: "When you search by geographical area, use this Go button."

Below the geographical search fields, there is a section titled "You may also select one or more capabilities upon which to search." with a note "Hold the <Ctrl> key down to make multiple selections." and a list box containing "Restaurant/Hotel", "Kiosk", "Equipment Roll Out", and "Oil Moving/Installation". A "Go!" button is next to the list box.

Two callout bubbles on the left side provide additional instructions: "Use the top portion of the screen to search by name or number." and "Use the bottom portion of the screen to search by geographical location."

The status bar at the bottom of the browser window shows "Intelli-Search: A - Account, P - Partner, O - Order, I - Invoice" and the "Internet" icon.

Figure 35—Search screen

Using the Standard Search Screen

The standard search enables you to be very detailed when searching. A standard search can be done using either of two methods: searching by name/number or searching by geographical region.

The screen is split into two general areas. Searching by name or number is performed in the top portion of the screen. Searching by geographical location is performed in the bottom portion of the screen.

Searching by Name/Number

Searching by name/number requires that you know specific information about the account, partner, or order you are searching for. If you are searching for an *account* or *partner*, you can use the name, the Home Express ID, or the SIRVA ID. If you are searching for an *order*, you can use the Home Express ID, Partner Invoice Number, Order Name, or Account Reference Number.

When using an ID number to search, you type the entire number or you type a partial number followed by the *wildcard character*, which is an asterisk (*). For example, if you are searching for an order, you can use the invoice number 130520030303 (the entire number) or you could type 1305*. The system would display all invoices beginning with the numbers 1305.

If you are searching using a name, you can use a full or partial name. For example, if you are searching for an account named *Acme Hardware*, you could search by typing the partial name *Acme*. The system would display all accounts with names beginning with *Acme*. When using a partial name, you don't have to use any special characters.

Searching by Geographical Region

The second method, searching by geographical region, allows you to search based on location instead of a name or ID number. It can only be used to search for accounts or partners. It cannot be used to search for orders. It is usually used when you don't know the name or ID number of the account or partner or when you want to see a list of all accounts or partners in a specific area.

When searching by geographical area, you specify a central location and a distance. The distance is also called the *proximity*. The search result is a list of all accounts or partners within that distance from the central location. For example, if you are searching for partners and type Fort Wayne, Indiana and the number 100, the system returns all partners within 100 miles of Fort Wayne.

When searching for partners, the system gives you the opportunity to select capabilities. Capabilities are not used at this time. Please ignore the capabilities list.

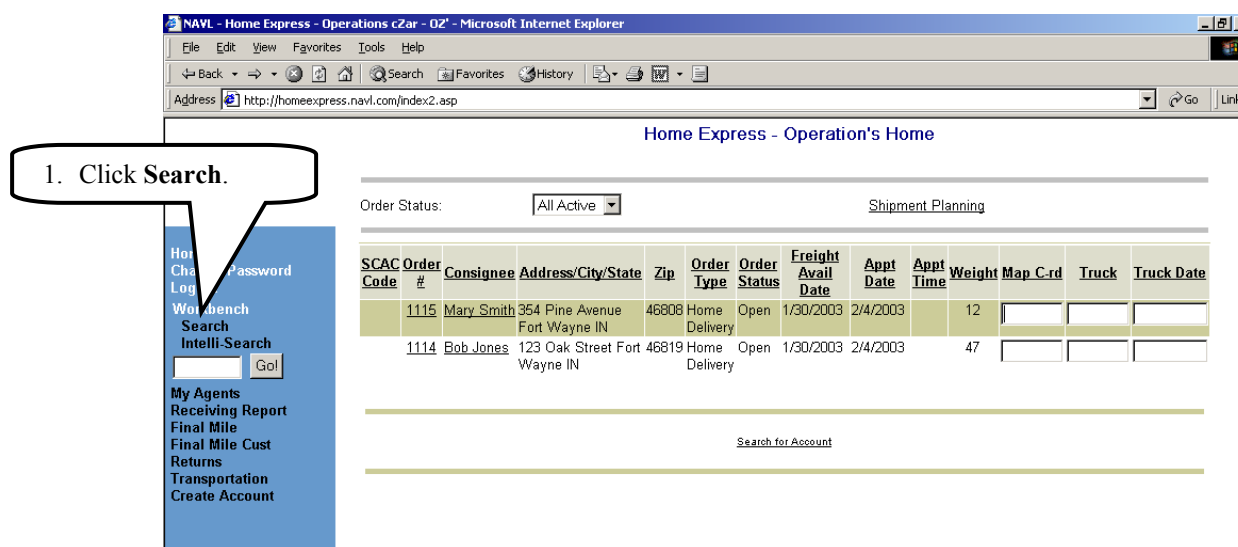


Figure 36—Home screen

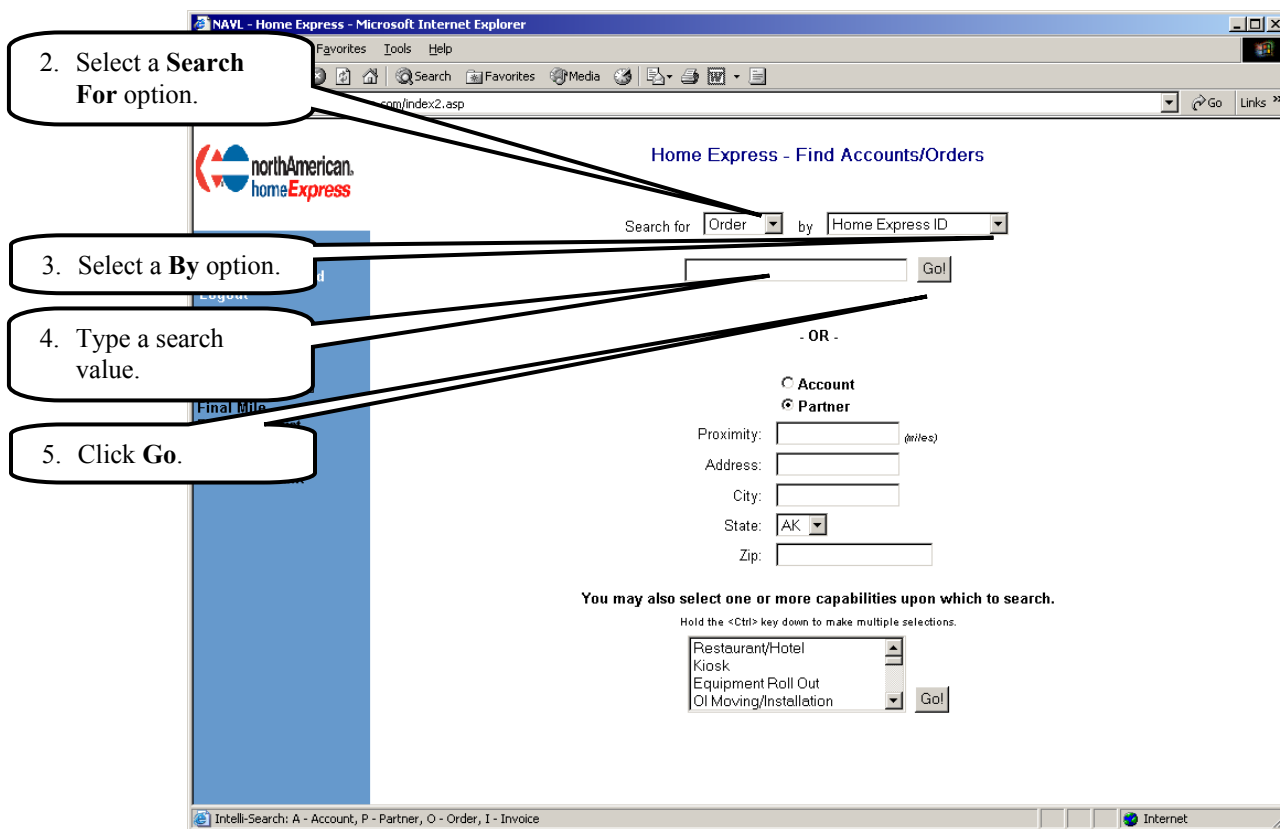


Figure 37—Search screen

Instructions: Searching by Name/Number

Use the steps below when you know the name or ID number of the account, partner or order.

1. In the navigation bar on the left, click **Search**.
The system displays the **Find Accounts/Orders** screen.
2. In the top half of the screen, from the **Search For** drop-down list, select an option.
3. From the **By** drop-down list, select an option.
4. Type the search value in the box.



The search value must correspond to the options selected. For example, if you choose the *Search For* option *Account* and the *By* option *Name*, then the search value box must contain an account name.



When searching using an ID number you can do a partial match if you use the *wildcard* character. The wildcard character is an asterisk (*). For example, if you are searching for an order with the invoice number 130520030303, you could type 1305* as the search criteria. When searching for a name, you don't have to use a special character to do a partial search.

5. Click **Go**.
The system displays a list of accounts, partners, or orders that match the search criteria entered.



Use the Go option in the top portion of the screen.

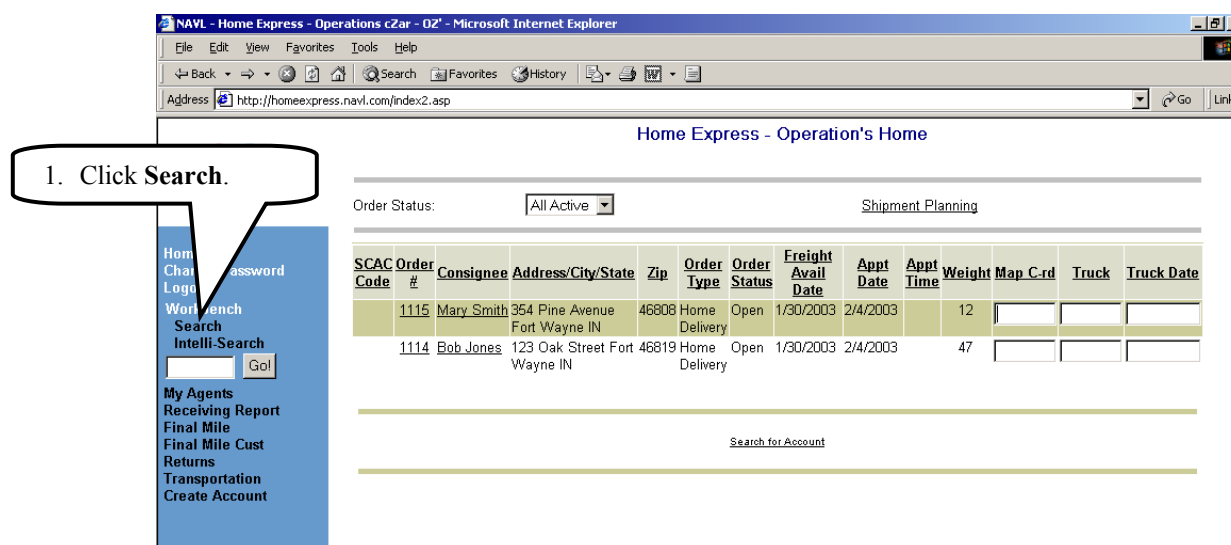


Figure 38—Home screen

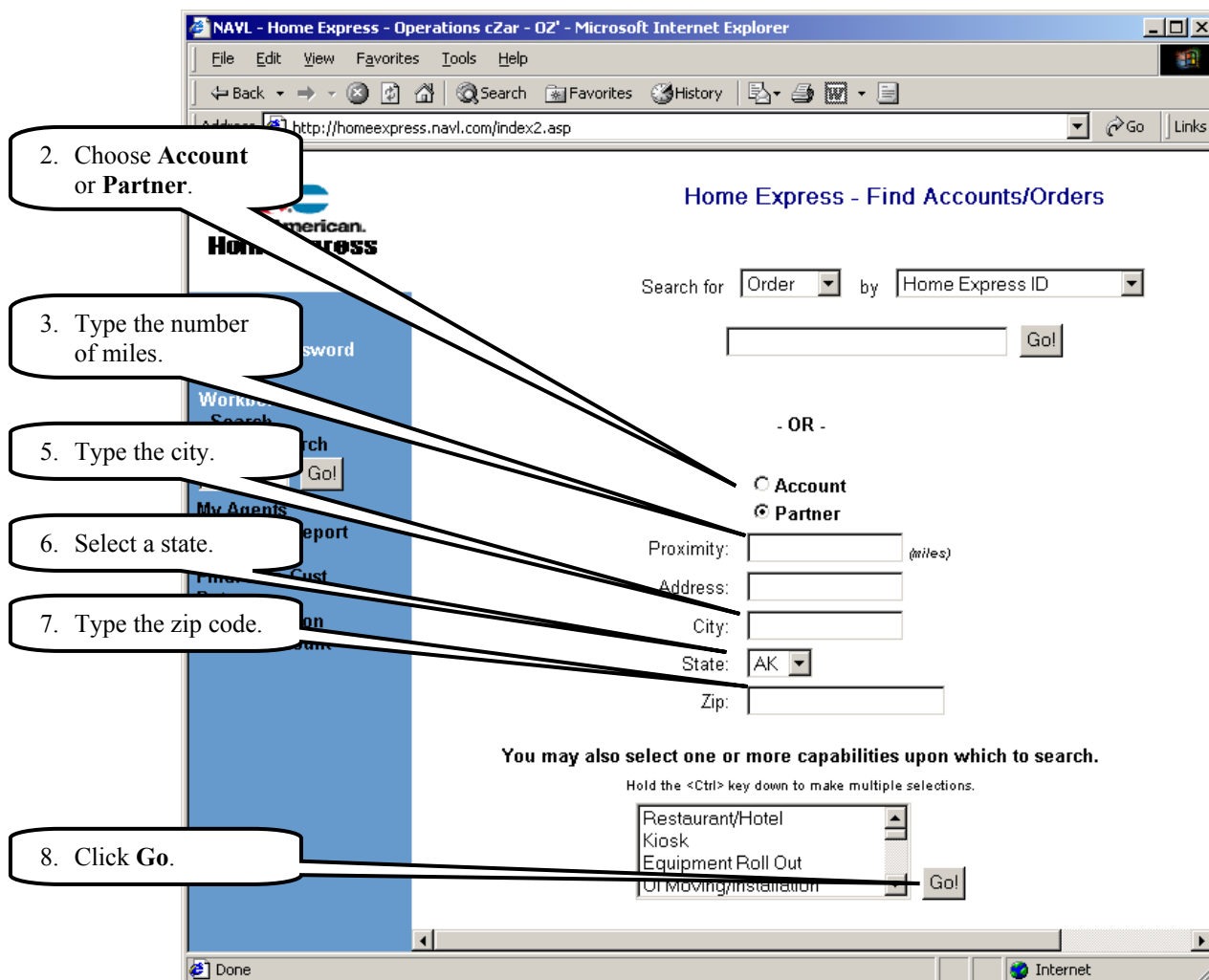


Figure 39—Search screen

Instructions: Searching by Geographical Area and Capabilities

Use the steps below when you want to find an account or partner within a specific distance of a location.

1. In the navigation bar, click **Search**.
2. In the lower half of the screen, select either **Account** or **Partner** by clicking an option button.



You cannot search for orders based on geographical area.

3. Type the distance (in miles) in the *Proximity* field.
4. Type the address (optional) in the *Address* field.
5. Type the city in the *City* field.
6. Select the state from the drop-down list.
7. Type the zip code in the *Zip* field.
8. Click **Go**.

The system displays a list of accounts or partners that match the search criteria entered.



Use the Go button in the bottom portion of the screen.

Field Table: Find Accounts/Orders Screen

The following fields are used on the Find Accounts/Orders screen when performing a standard search.

Table 16—Find Accounts/Orders screen field definitions, standard search

Field Name	Description	Field Type	Notes
Search For	Allow you to select which type of information you are looking for.	Optional	Default value is <i>Order</i> . Choices are: • Account • Partner • Order
By	Allows you to select how you want to search for information.	Optional	Default value is <i>Home Express ID</i> . The list of available choices changes, depending on what you selected in the <i>Search For</i> field. If you selected Account or Partner, your choices are: • Home Express ID • SIRVA ID • Name If you selected Order, your choices are: • Home Express ID • Partner Invoice Number • Order Name • Account Reference Number
Search text box (Not labeled on the screen.)	An empty box in which you type the search criterion.	Required	Must correspond to options selected for Search For and By fields. For example, if you selected Order and Home Express ID, the search value must be a full or partial order ID. When the search criterion is a value, you can type a full or partial value. If you type a partial value, you must follow it by the wildcard character, which is an asterisk (*). When the search criterion is text, you can type a full or partial entry, such as <i>Acme</i> or <i>Ac</i> . You do not have to use the wildcard character.

Field Table: Find Accounts/Orders Screen

The following fields are used on the Find Accounts/Orders screen when performing a proximity search.

Table 17—Find Accounts/Orders screen field definitions, proximity search

Field Name	Description	Field Type	Notes
Account/ Partner Selection Buttons	Allow you to select which type of information you are looking for.	Optional	Default value is <i>Partner</i> . Choices are: • Account • Partner
Proximity	Distance, in miles, from the location entered.	Required	The proximity, when combined with the location information, tells the system the area that you want to search. For example, if you were searching for an account, you might enter 50 in the proximity field. You could then type the address of your agent location in the location fields. The system would find any account within 50 miles of your agent location.
Address	Address of the search location.	Optional	
City	City of the search location.	Required	
State	State of the search location.	Required	
Zip	Zip code of the search location.	Required	
Capabilities	Options used to limit the search.	Optional	Only available when searching for a partner. Not currently used.

Using Intelli-Search

The Intelli-Search option is faster than the standard search. It uses a combination of shortcuts and data to specify what you are looking for.

Shortcuts are one-letter abbreviations for the type of data you are searching for. You can use the following shortcuts when using Intelli-Search: **O** (order), **A** (account), **P** (partner), **I** (invoice), or **R** (Account Reference Number). The shortcuts are shown in the bottom-left corner of the screen.

For example, if you were searching for an order that has the Home Express ID *1305*, you would type *O1305*. The letter **O** is a shortcut for order, and the number 1305 is the order's ID number. If you were searching for an account named Acme Hardware, you would type *AAcme*. The letter **A** is a shortcut for account, and the word Acme is the beginning of the account name.

The data used can be either a full or partial name or an ID number. When using an ID number, you can type the entire number or a portion of the number followed by the *wildcard character*, which is an asterisk (*). When using a name, you can type the entire name or a portion of the name. You do not have to use the wildcard character when searching by name.

The wildcard character can also be used to search for all accounts or partners. For example, you would type *P** to locate all partners. Since you didn't specify any portion of a partner name or number, the system displays all partners.

1. Click in the **Intelli-Search** field.

SCAC Code	Order #	Consignee	Address/City/State	Zip	Order Type	Order Status	Freight Avail Date	Appt Date	Appt Time	Weight	Map C-rd	Truck	Truck Date
	1115	Mary Smith	354 Pine Avenue Fort Wayne IN	46808	Home Delivery	Open	1/30/2003	2/4/2003		12			
	1114	Bob Jones	123 Oak Street Fort Wayne IN	46819	Home Delivery	Open	1/30/2003	2/4/2003		47			

[Search for Account](#)

Figure 40—Home screen

2. Type the shortcut letter followed by the search data.

2. Click Go.

Figure 41—Intelli-Search Examples

Instructions: Searching using Intelli-Search

Use the steps below to use the Intelli-Search option:

1. Click in the *Intelli-Search* field.



You do not have to click the word Intelli-Search, simply click in the white box below the word Intelli-Search.

2. Type the shortcut letter for the information you are looking for: **O** (order), **A** (account), **P** (partner), **I** (invoice), or **R** (account reference number) followed by the search data.



The search data must correspond to the code entered. For example, if you type O for order, you must type an order ID number. If you type A for account, you can enter type an account ID or name.



When searching using an ID number you can perform a partial match if you use the *wildcard* character. For example, if you are searching for an invoice with the number 130520030303, you would type I1305* as the search criteria. When searching for a name, you don't have to use a special character to do a partial search.

3. Click **GO**.

Or

Press **Enter**.

The system displays a list of information that match the search criteria entered.



A common error when using the Intelli-Search option is to use the number zero instead of the letter o as the shortcut for order. Be sure to use the letter o.



If you use Intelli-Search and the search results are not what you need, try searching again using the standard search option.



After you use Intelli-Search, the data you typed stays in the Intelli-Search box. You can run the search again simply by clicking **Go**.

Conclusion

Searching is the easiest way to find the information you are looking for. There are several methods for searching. Use whichever method is appropriate, depending upon the data you are looking for and your personal preferences.

Using My Agents

Description

The My Agents option allows you to see your *partner profile* and to access several sub-options. The partner profile and the sub-options list information about a partner, such as the partner's ID number, addresses, contact names, etc.

When you become a Home Express provider, the coordinator in Fort Wayne creates the partner profile. You can change some of the information on your profile. A coordinator must change the other information. For example, the agent partner can add addresses to the address list but cannot change their partner ID.

This section of the manual describes how to use the My Agents option and the sub-options available from the Partner Profile screen.

1. Click My Agents.

2a1. Click Capabilities.

Only a coordinator can change this information.

Figure 42—Partner Profile screen

2a2. Review the information.

2a3. Click Back to Profile.

Figure 43—Partner Capabilities screen

Instructions: Reviewing the Partner Profile

Use the steps below to review Partner Profile information.

1. In the navigation bar, on the left side of the screen, click **My Agents**.
The system displays the **Partner Profile** screen.



At the top of the screen is information that was added when the coordinator created the partner. An agent partner cannot change this information; you must call a coordinator.

2. Use any of the following methods to review information in the sub areas:

- a. Reviewing Capabilities:

Capabilities is a list of the type of work your agency is able to do. It also lists information about your facility, your operating hours, etc.



Most people are not using the capabilities. You can enter the information if you want to, or leave it blank.



You can set up and change the capabilities list. See “Instructions: Changing Capabilities” on page 109.

- 1) Click **Capabilities**.

The system displays the **Partner Capabilities** screen.

- 2) Review the information.

- 3) To return to the **Partner Profile** screen, scroll to the bottom of the screen and then click **Back To Profile**.



2b3.Click Partner Profile.

12/10/03

b. Reviewing Accounts Payable Inquiry:

Accounts Payable Inquiry lists information about invoices including the invoice number, invoice amounts, payment dates, etc.

1) Click **Accounts Payable Inquiry**.

The system displays the **Accounts Payable Inquiry** screen.

2) Review the information:

- The default view on this screen shows all invoices. If you want to see only the outstanding invoices, click the **Outstanding** option button.
- If you want to see the details of an invoice, click the partner invoice number.
- If you want to see the details of an order, click the order number.

3) To return to the **Partner Profile** screen, click **Partner Profile**.

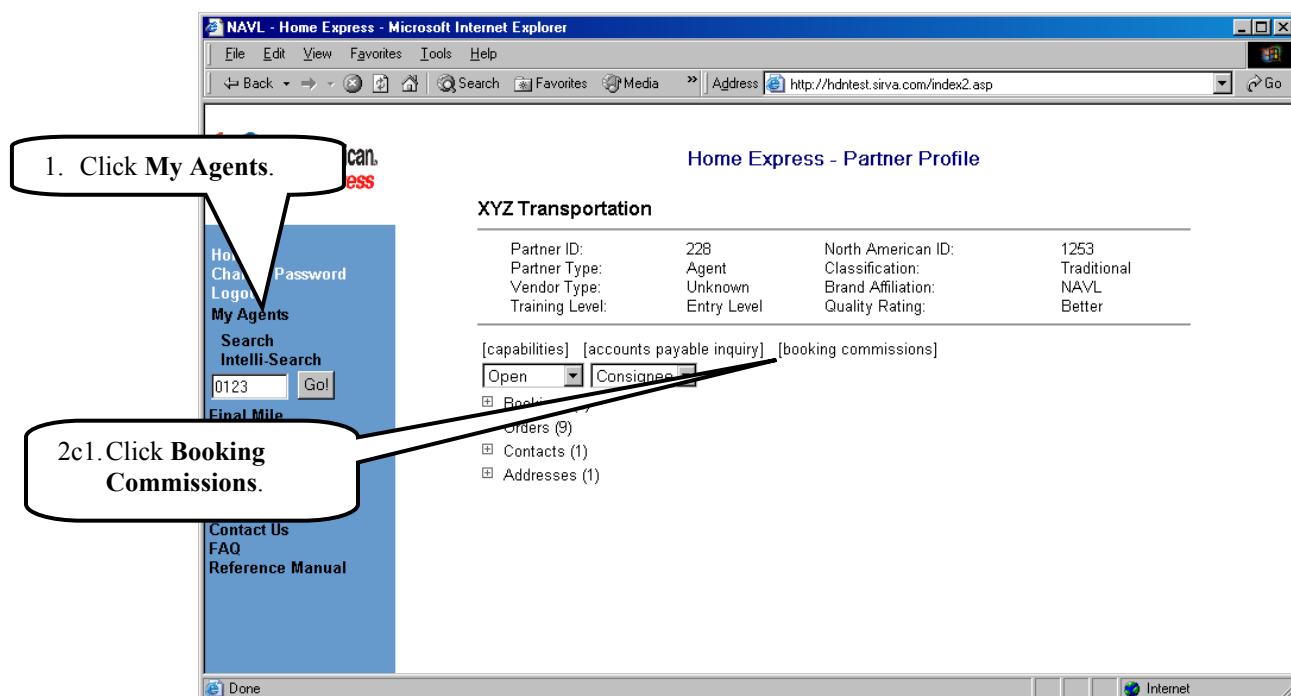


Figure 46—Partner Profile screen

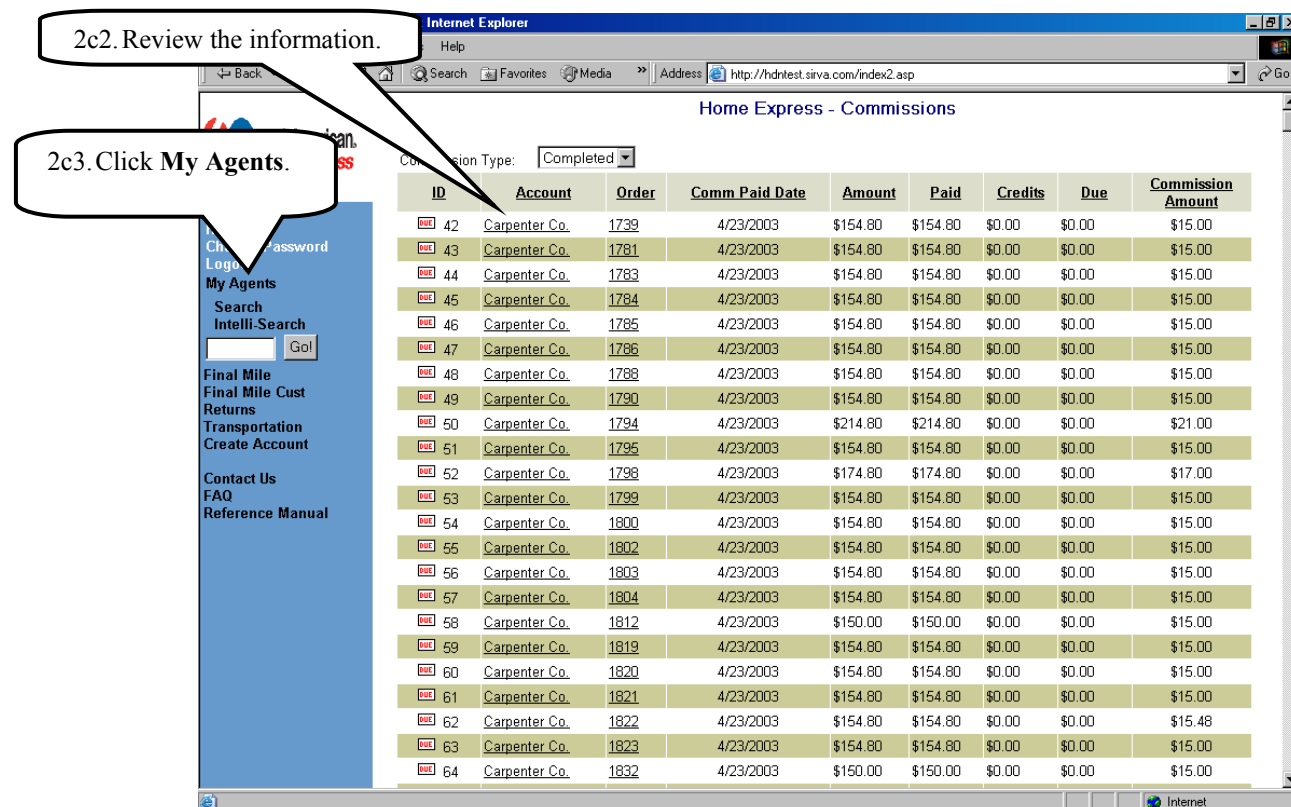


Figure 47—Booking Commissions screen

c. Reviewing the Booking Commissions information:

Booking Commission lists information about orders for which your agency is the booking agent. It allows you to review the orders for which you will receive a booking commission.

1) Click **Booking Commission**.

The system displays the **Booking Commission** screen.

2) Review the information:

- The default view on this screen shows completed orders. If you want to see pending order, select **Pending** from the **Commission Type** drop-down list.

3) To return to the **Partner Profile** screen, go to the blue navigation bar and then click **My Agents**.

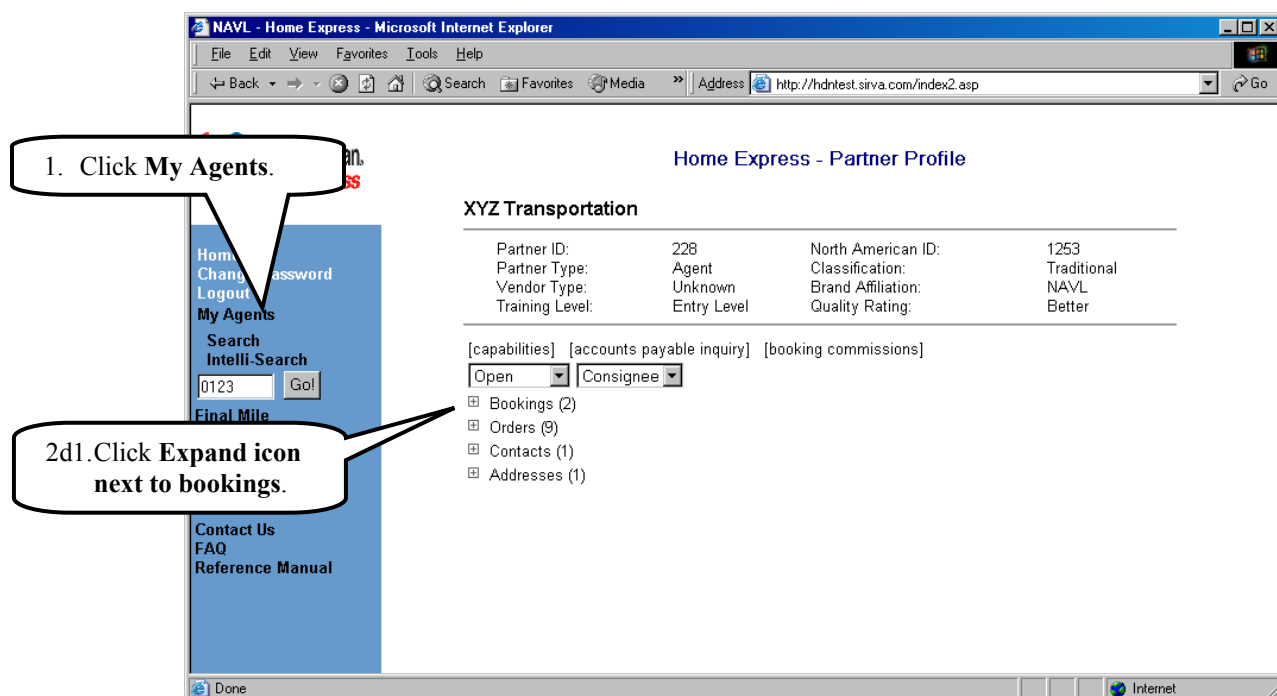


Figure 48—Partner Profile screen

d. Reviewing Bookings:

If you are a booking agent for an account, you will see any orders for that account in the **Bookings** tree. Next to the word bookings, in parentheses, is the number of bookings in the list. Bookings are added to the list automatically when an order that you are the booking agent for is entered in the system.



Just above the label *Bookings* are two drop-down lists. They help you find the information you are looking for. The first drop-down list allows you to limit the information based on status. For example, if you want to see all orders that are in a status of hold, you would select hold from the list. The other drop-down list allows you to change the order in which information is sorted. Both drop-down lists apply to the Bookings and Orders options.

1) To expand the **Bookings** tree, click the plus sign (+).

The system displays a list of bookings.

a) To expand an individual booking, click the plus sign (+).

The system displays identifying information about the booking, including the consignee name, and the account name.

b) To collapse the booking, click the minus sign (-).

c) To see all of the details about a booking, click the entry in the **Booking** tree.

The system displays the **Details II** screen.

2) To collapse the **Bookings** tree, click the minus sign (-).

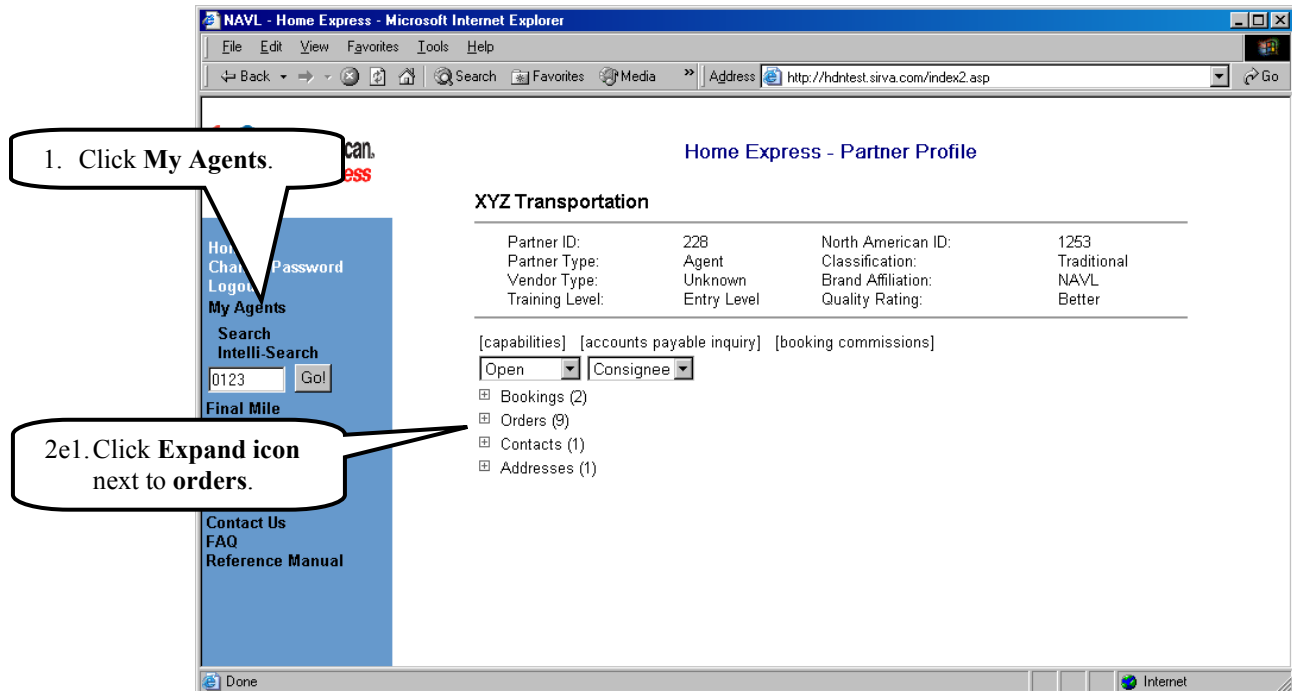


Figure 49—Partner Profile screen

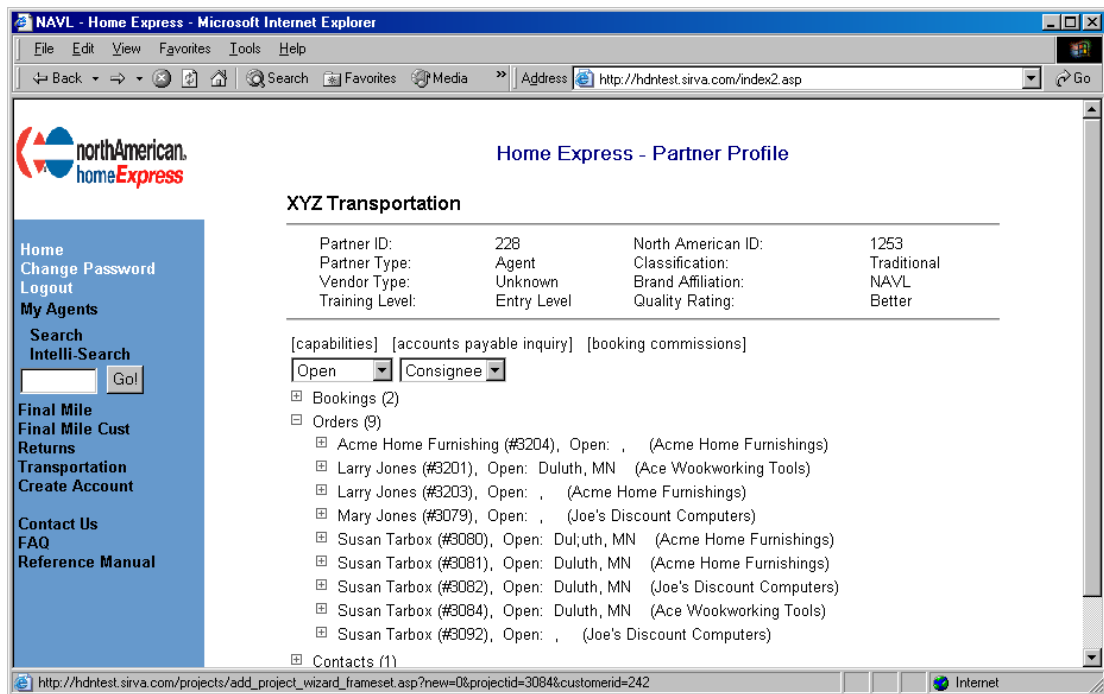


Figure 50—Using the Orders Tree

e. Reviewing Orders:

On the **Partner Profile** screen, a tree displays all of your open orders. Orders are added to the list automatically when they are entered in the system.



Just above the label *Bookings* are two drop-down lists. They help you find the information you are looking for. The first drop-down list allows you to limit the information based on status. For example, if you want to see all orders that are in a status of hold, you would select hold from the list. The other drop-down list allows you to change the order in which information is sorted. Both drop-down lists apply to the Bookings and Orders options.

1) To expand the **Orders** tree, click the plus sign (+).

The system displays a list of orders.

a) To expand an individual order, click the plus sign (+).

The system displays identifying information about the order, including the consignee name, and the account name.

b) To collapse the order, click the minus sign (-).

c) To see more details about an order or edit a order, click the entry in the **Orders** tree.

The system displays the **Details II** screen.

2) To collapse the **Orders** tree, click the minus sign (-).

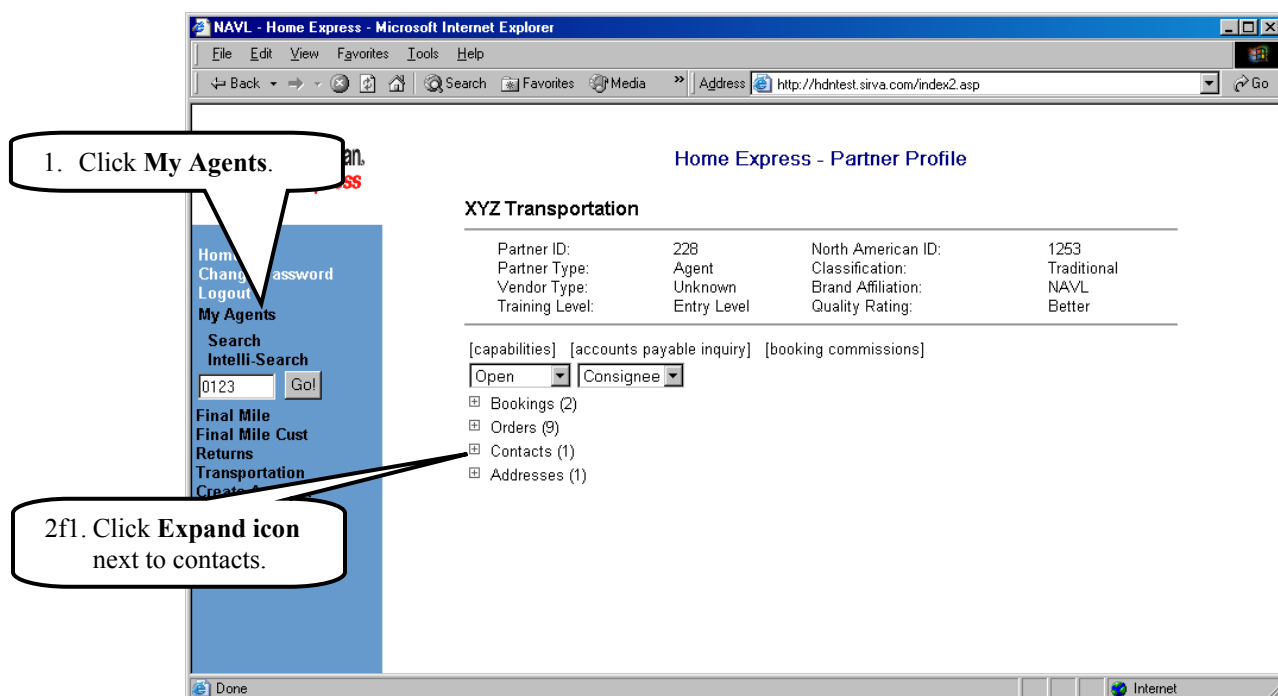


Figure 51—Using the Contacts Tree

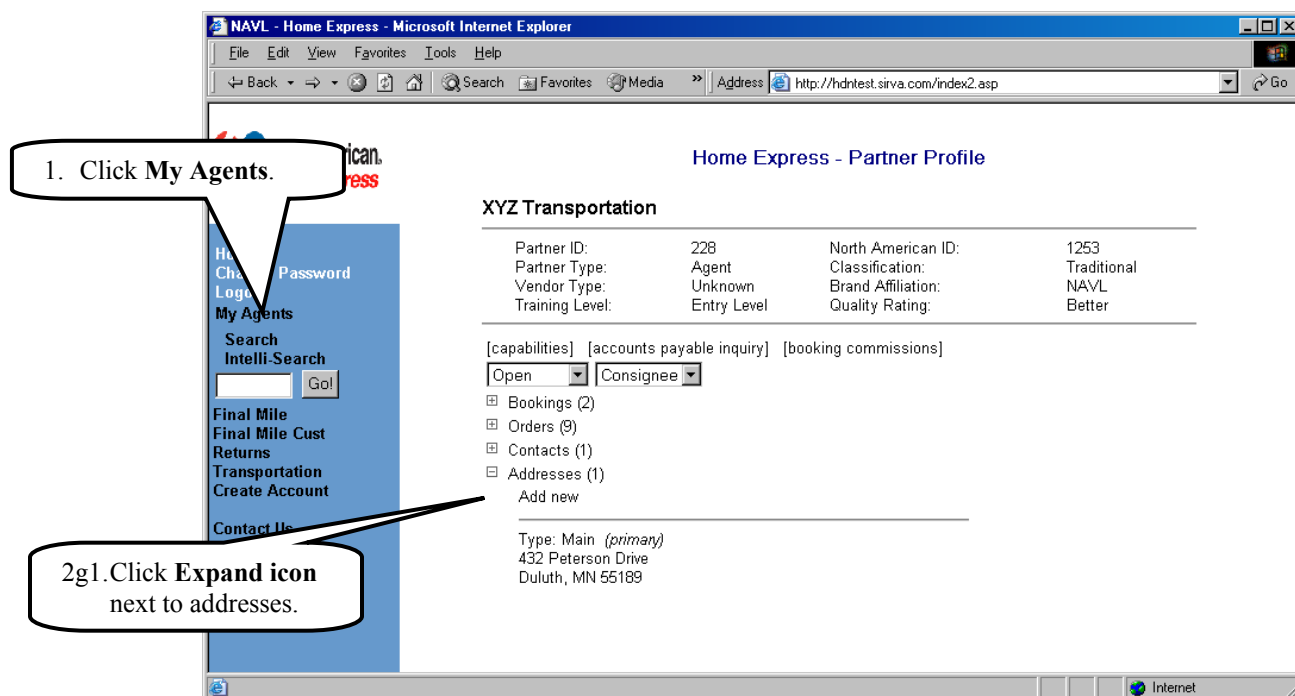


Figure 52—Using the Addresses Tree

f. Reviewing Contacts:

The **Contacts** tree lists key people at your agent location. It might include the billing manager, the warehouse operations manager, etc. Entering the contacts into Home Express makes it easy for the coordinators in Fort Wayne to locate a name and phone number if they have a question.



You can edit the contacts list. See “Instructions: Adding or Editing Contacts” on page 115.

1) To expand the **Contacts** tree, click the plus sign (+).

The system displays a list of contacts.

a) To see more details about a contact, click the contact name.

The system displays the **Add/View Partner Contact** screen.

b) When done, click **Back to Profile**.

The system displays the **Partner Profile** screen.

2) To collapse the **Contacts** tree, click the minus sign (-).

g. Reviewing Addresses:

The Addresses tree lists your agent locations. Addresses might include your warehouse, your billing office, etc.



You can edit the address list. See “Instructions: Adding or Editing Addresses” on page 119.

1) To expand the **Addresses** tree, click the plus sign (+).

The system displays a list of addresses.

a) To see more details about an address, click the address.

The system displays the **Add/View Partner Addresses** screen.

b) When done, click **Back to Profile**.

The system displays the **Partner Profile** screen.

2) To collapse the **Addresses** tree, click the minus sign (-).

Field Table: Partner Profile Screen

The following fields are used on the Partner Profile screen.

Table 18—Partner Profile screen field definitions

Field Name	Description	Field Type	Notes
Partner ID	ID number used to uniquely identify an agent partner in the Home Express system.	Display only	
North American ID	ID number used to identify the agent partner. Assigned by North American Van Lines.	Display only	
Partner Type	Identifies whether the partner is an agent or a vendor.	Display only	
Classification	Identifies the type of service performed by an agent.	Display only	For example, full service, electronics, etc.
Vendor Type	Not currently used in Home Express system. Might be used in the future.	Display only	Will read “unknown” for all agent partners.
Brand Affiliation	Indicates whether the agent partner is a NAVL agent or an Allied agent.	Display only	
Training Level	Not currently used in Home Express system. Might be used in the future.	Display only	Will read “entry level” for all agent partners
Quality Rating	Not currently used in Home Express system. Might be used in the future.	Display only	
Status drop-down list	Used to limit the bookings list and the orders list to entries that have a specific status.	Optional	Default value is <i>Open</i> . Possible values are: • Open • Set off • In Transit • Delivered • Billed • Canceled • Complete • All Active

			• Hold
Field Name	Description	Field Type	Notes
Sort drop-down list	Used to sort the bookings list and the orders list.	Optional	Default value is <i>Consignee</i> . Possible values are: • Consignee • Order ID • City, State • Date
Bookings	Tree listing the orders for which the agent partner is the booking agent.	Optional	Following the word <i>Bookings</i> , a number is displayed in parentheses. It shows the number of bookings in the tree.
Orders	Tree listing the orders that the agent partner is responsible for.	Optional	Following the word <i>Orders</i> , a number is displayed in parentheses. It shows the number of orders in the tree.
Contacts	Tree listing contact people at the agent partner location.	Optional	Following the word <i>Contacts</i> , a number is displayed in parentheses. It shows the number of contacts in the tree.
Addresses	Tree listing the addresses where the agent partner does business. Would include warehouses, the billing office, etc.	Optional	Following the word <i>Addresses</i> , a number is displayed in parentheses. It shows the number of addresses in the tree.

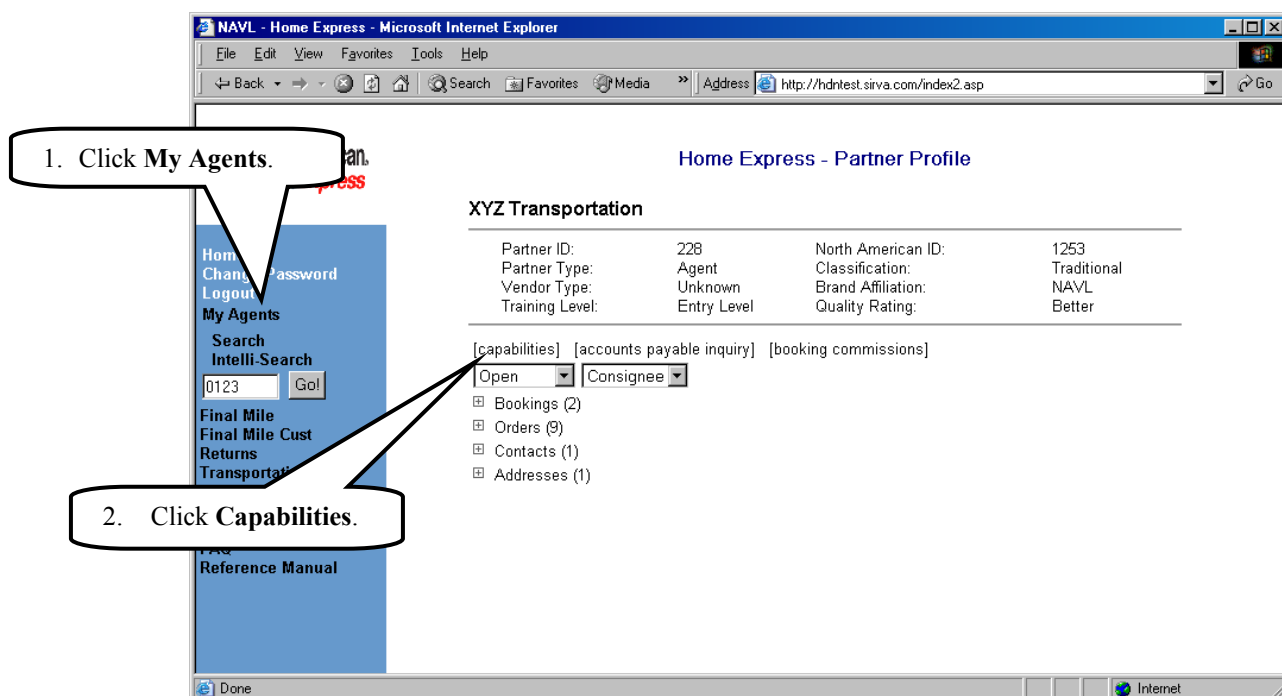


Figure 53—Partner Profile screen

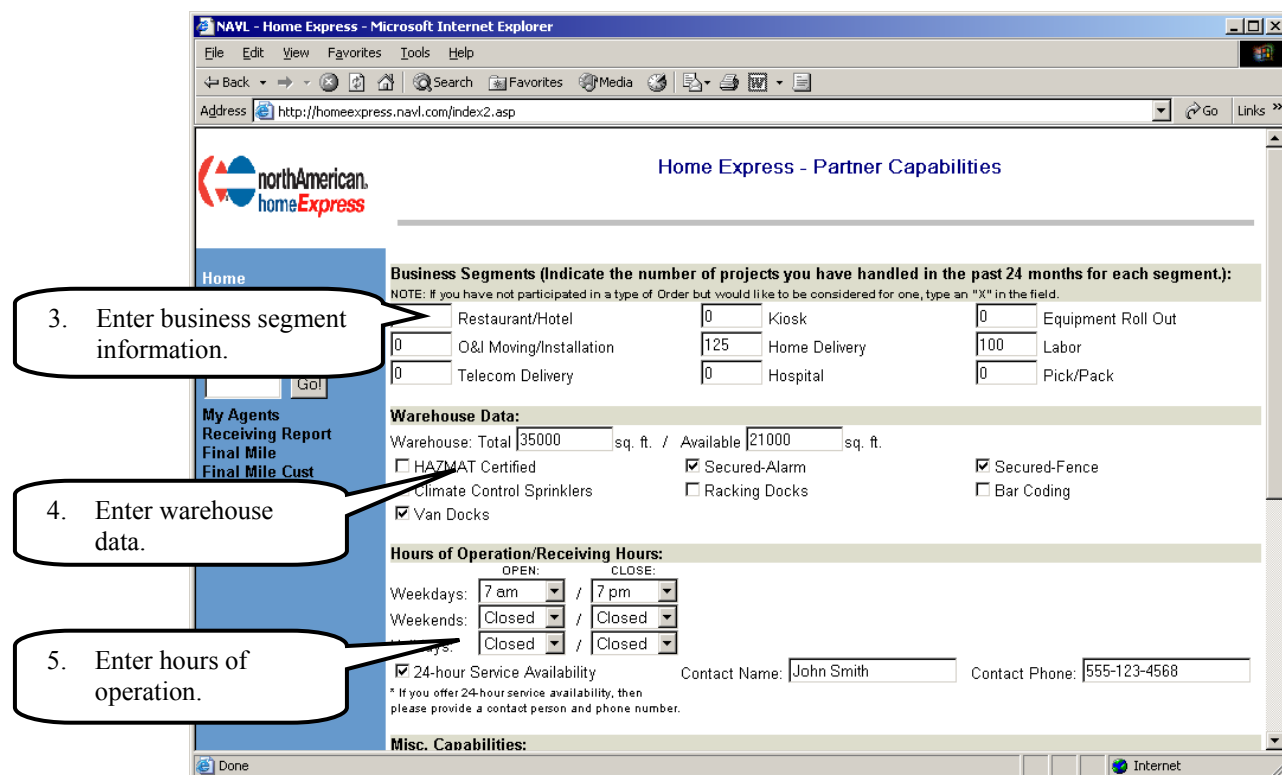


Figure 54—Top portion of the Partner Capabilities screen

Instructions: Changing Capabilities

Use the instructions below to set up your agency's capabilities. This procedure is not performed on a regular basis. It is done when an agent begins using Home Express and whenever the information changes.

1. In the navigation bar, on the left side of the screen, click **My Agents**.
The system displays the **Partner Profile** screen.
2. Click **Capabilities**.
The system displays the **Partner Capabilities** screen.
3. Enter business segment information:
 - a. In the box next to each business segment listed, type the number of times you have performed that type of service in the last 24 months. For example, if you have performed 50 Telecom Deliveries in the last 24 months, you would type 50 in the box.
 - b. If you have not performed a type of service, but would like to be a provider for the service, type an **X** in the box.



At this time, *Home Delivery* is the only business segment that Home Express covers. Other business segments might be added in the future. You can still enter data for the other business segments. It will allow SIRVA to gather statistics about business segments the agent partners are capable of performing.

4. Enter warehouse data:
 - a. Type the total square footage and the available square footage in the fields provided.
 - b. Click the check box next to any of the characteristics, such as HazMat certified, that apply to your agency.
5. Enter hours of operation:
 - a. Select an opening time and a closing time for each category—weekdays, weekends, and holidays.
 - b. If your agency is capable of 24-hour operations, click the check box.
 - c. If your agency is capable of 24-hour operations, type a contact name and contact phone number in the fields provided.

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Hours of Operation/Receiving Hours:

Weekdays: OPEN: 7 am / CLOSE: 7 pm

Weekends: Closed / Closed

Holidays: Closed / Closed

☒ 24-hour Service Availability
* If you offer 24-hour service availability, then please provide a contact person and phone number.

Contact Name: John Smith Contact Phone: 555-123-4568

Misc. Capabilities:

☒ Lift Gate Straight Vans	☐ Lift Gate Commercial Trailers
☐ Stair Crawlers/Climbers	☒ Dollies
☐ Rigging Equipment	☐ Commercial Lifts
☒ Onsite Fork Lifts	☐ Carpet Pole
☐ Installation	☒ Power Tools
☐ Office Systems	

Comments:

Set Project Capabilities Back to Profile

[Search for Account](#) [Search for Partner](#)

Internet

6. Enter miscellaneous capabilities.

7. Type comments.

8. Click Set Project Capabilities.

9. Click Back to Profile.

Figure 55—Bottom portion of the Capabilities screen

6. Click the check box next to any of the miscellaneous capabilities that apply to your agency.
7. Type any comments about your agency's capabilities in the *Comments* field.
8. Click **Set Project Capabilities**.
The system saves the changes.
9. Click **Back to Profile**.
The system displays the **Partner Profile** screen.

Field Table: Capabilities Screen

The following fields are used on the Capabilities screen.

Table 19—Capabilities screen field definitions

Field Name	Description	Field Type	Notes
Business Segments	Used to indicate which business segment the agent partner does business in and the frequency that they do business in each segment.	Optional	In the text box next to each business segment, type the number of times you have projects you have completed in the last 24 months. Possible values: • Restaurant/hotel • Kiosk • Equipment Rollout • O & I Moving/Installation • Home Delivery • Labor • Telecom Delivery • Hospital • Pick/Pack
Warehouse: Total Square Feet	Total square footage of warehouse space.	Optional	Include space that is currently in use and space that is available.
Warehouse: Available Square Feet	Square footage of warehouse space that is not currently in use.	Optional	
Warehouse options	Used to indicate whether or not various items are available at the warehouse.	Optional	Click the check box. A check mark indicates the option is available at the warehouse. Possible values: • Hazmat Certified • Secured-Alarm • Secured-Fence • Climate Control Sprinklers • Racking Docks • Bar Coding • Van Docks
Hours	Drop-down lists used to set opening and closing hours for the agent partner.	Optional	There are three sets of hours that you can set up: weekday hours, weekend hours (Saturday and Sunday), and holiday hours. You can specify different numbers for each set of hours. Be careful to take into account AM and PM when setting up hours.

Field Name	Description	Field Type	Notes
24 Hour Service Availability	Indicates whether or not the agent partner location is available for service 24 hours per day.	Optional	
Contact Name	If the agent is available for service 24 hours per day, the contact name is the name of the person you would contact to arrange after hours service.	Required, if the 24 Hour Service Availability option is turned on.	
Contact Phone	Phone number of contact person.	Required, if the 24 Hour Service Availability option is turned on.	
Misc. Capabilities	List of other capabilities or tools that an agent might have.	Optional	Click the check box to turn a capability on or off. Possible values: • Lift Gate Straight Vans • Lift Gate Commercial Trailers • Stair Crawlers/Climbers • Dollies • Rigging Equipment • Commercial Lifts • Onsite Fork Lifts • Carpet Pole • Installation • Power Tools • Office Systems
Comments	Any text or notes that apply to the agent partner's capabilities.	Optional	

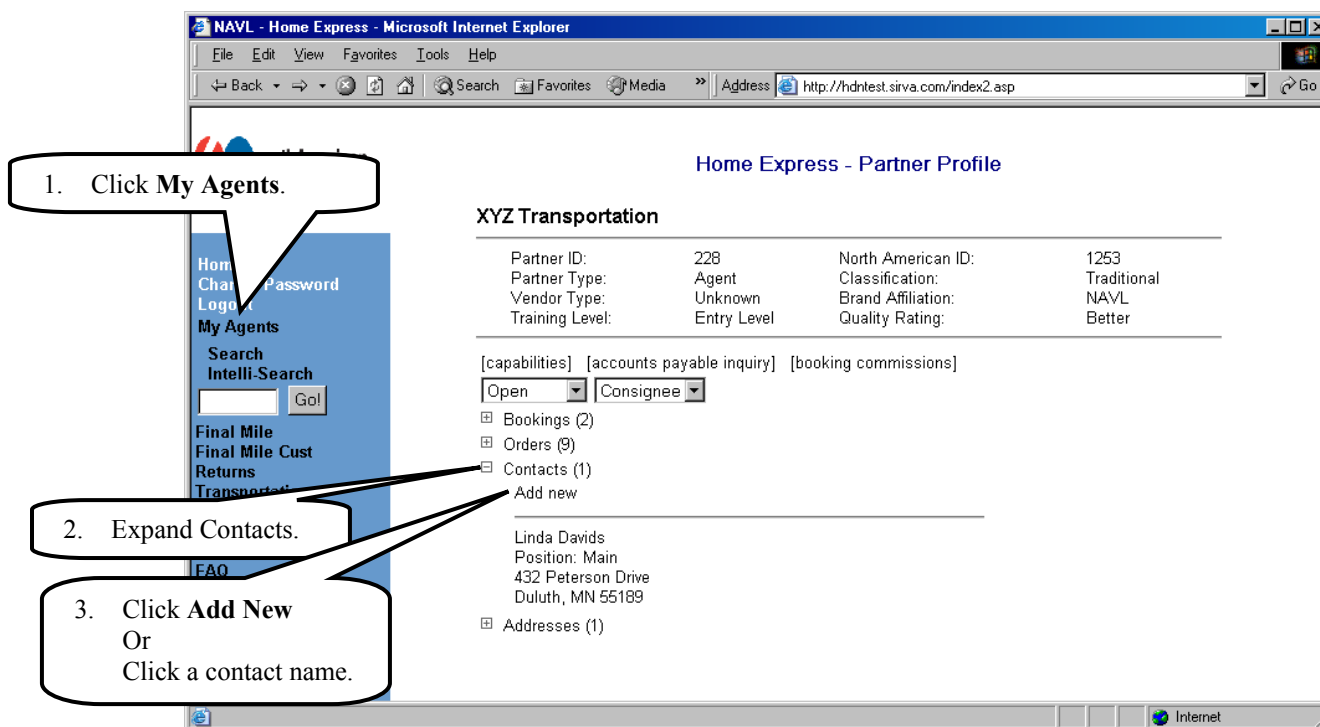


Figure 56—Partner Profile screen with Contacts expanded

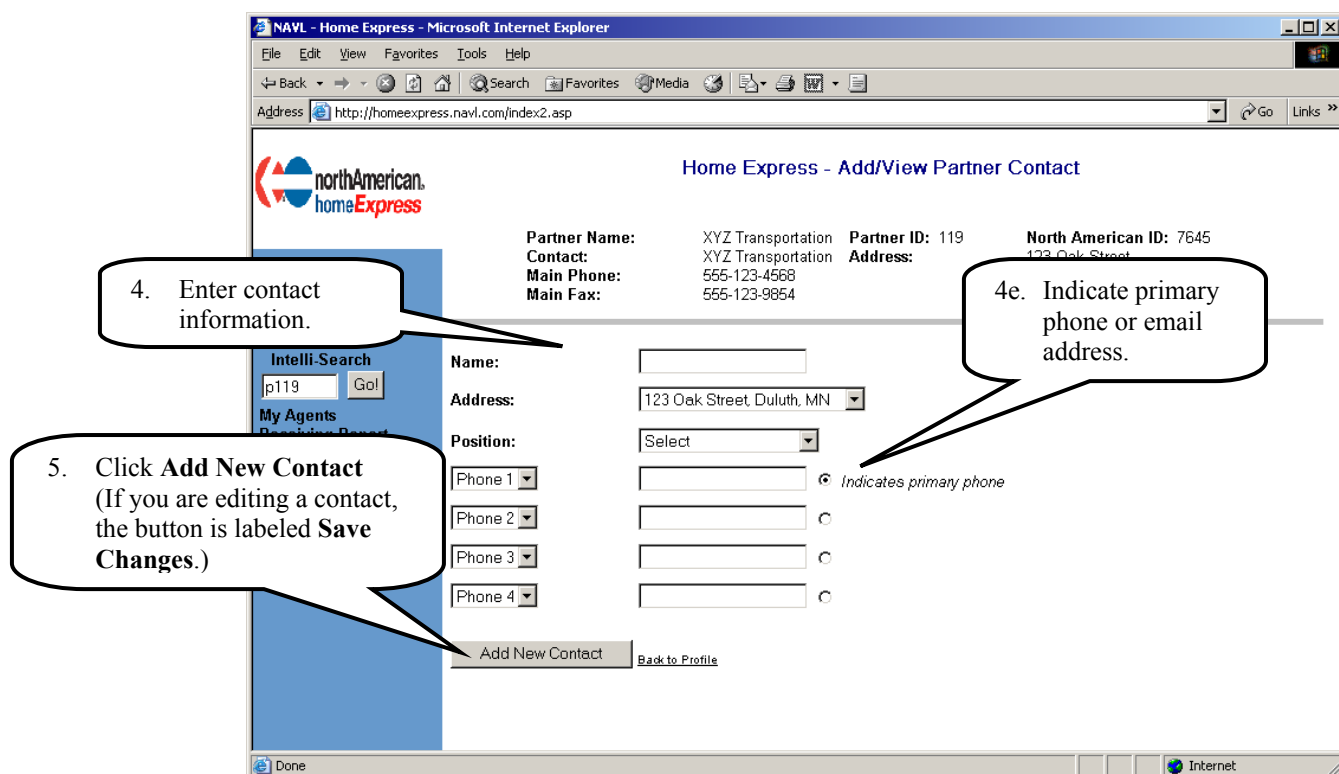


Figure 57—Adding a partner contact

Instructions: Adding or Editing Contacts

Use the following steps to enter a new contact or edit an existing contact.



Before adding contacts, add all of your agency's addresses to the address list. During this process you select an address from the address list.

1. In the navigation bar, on the left side of the screen, click **My Agents**.
The system displays the **Partner Profile** screen.
2. If the **Contacts** tree is collapsed, click the plus sign (+) to expand it.
3. Do one of the following:
 - a. To add a new contact, click **Add New**.

Or

 - b. To edit an existing contact, click the contact name.
The system displays the **Add/View Partner Contact** screen.
4. Enter contact information.
 - a. Type the contact name in the *Name* field.
 - b. Select an address from the **Address** drop-down list.
 - c. Select a contact type from the **Position** drop-down list.
 - d. Enter phone numbers and email addresses.



You use the phone number field for both phone numbers and email addresses. One of the choices for phone number type is Email.

- 1) Select a phone number type from the **Phone 1** drop-down list.
 - 2) Type the phone number or email address in the *Phone Number* field.
 - 3) Repeat these steps for other phone numbers.
 - e. Click a button to the right of a phone number or email address to indicate which number or address is the primary phone number.
5. If you are adding a new contact, click **Add New Contact**.
Or
If you are editing a contact, click **Save Changes**.
The system saves the changes and returns to the **Partner Profile** screen.

Field Table: Add/View Partner Contact Screen

The following fields are used on the Add/View Partner Contact screen.



Before adding contacts, make sure that you have added all of the agent partner addresses. One step in adding a contact is to select an address from the address list.

Table 20—Add/View Partner Contact screen field definitions

Field Name	Description	Field Type	Notes
Partner Name	Name of the agent partner.	Display only	
Partner ID	ID number used to uniquely identify an agent partner in the Home Express system.	Display only	
North American ID	ID number used to identify the agent partner. Assigned by North American Van Lines.	Display only	
Contact	Name of the agent partner.	Display only	
Address	Main address for the agent partner.	Display only	
Main Phone	Phone number of the agent partner's main address.	Display only	
Main Fax	Fax number of the agent partner's main address.	Display only	
Name	Name of the contact person.	Required	
Address	List of all of the agent partner's locations.	Optional	Defaults to the primary address for the agent partner.
Position	Describes the contact's job responsibilities at the agent partner.	Required	Possible values: • Main • Setup • DSA • Inventory • Billing • DSA Mail • Warehouse • Warehouse Ops Man • Accounts Payable • Accounts Receivable • Returns

Field Name	Description	Field Type	Notes
Phone Number Type	Describes the information in the Phone Number field.	Required	Possible values: • Main • Fax • Speed • NADS • Email
Phone Number	Phone number or email address of the contact person.	Required	Information typed must correspond to the phone number type. For example, if the phone number type is Email, the phone number must be an email address.
Primary address option buttons	Used to designate one phone number or email address as the primary contact.	Required	The first button is selected by default.
Delete Contact	Check box used to delete a contact from the contact list.	Optional	Only available when editing an existing contact. If you are creating a new contact and want to cancel without saving the changes, click Back to Profile .

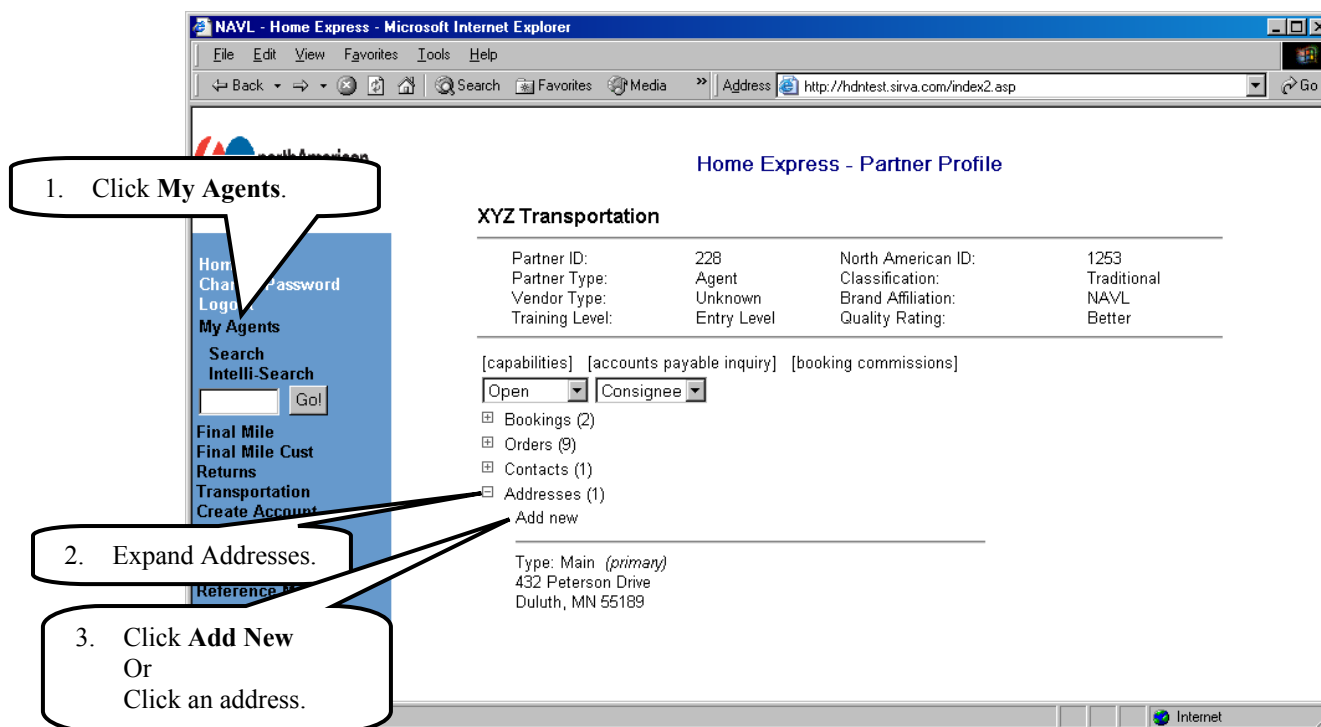


Figure 58—Partner Profile screen with Contacts expanded

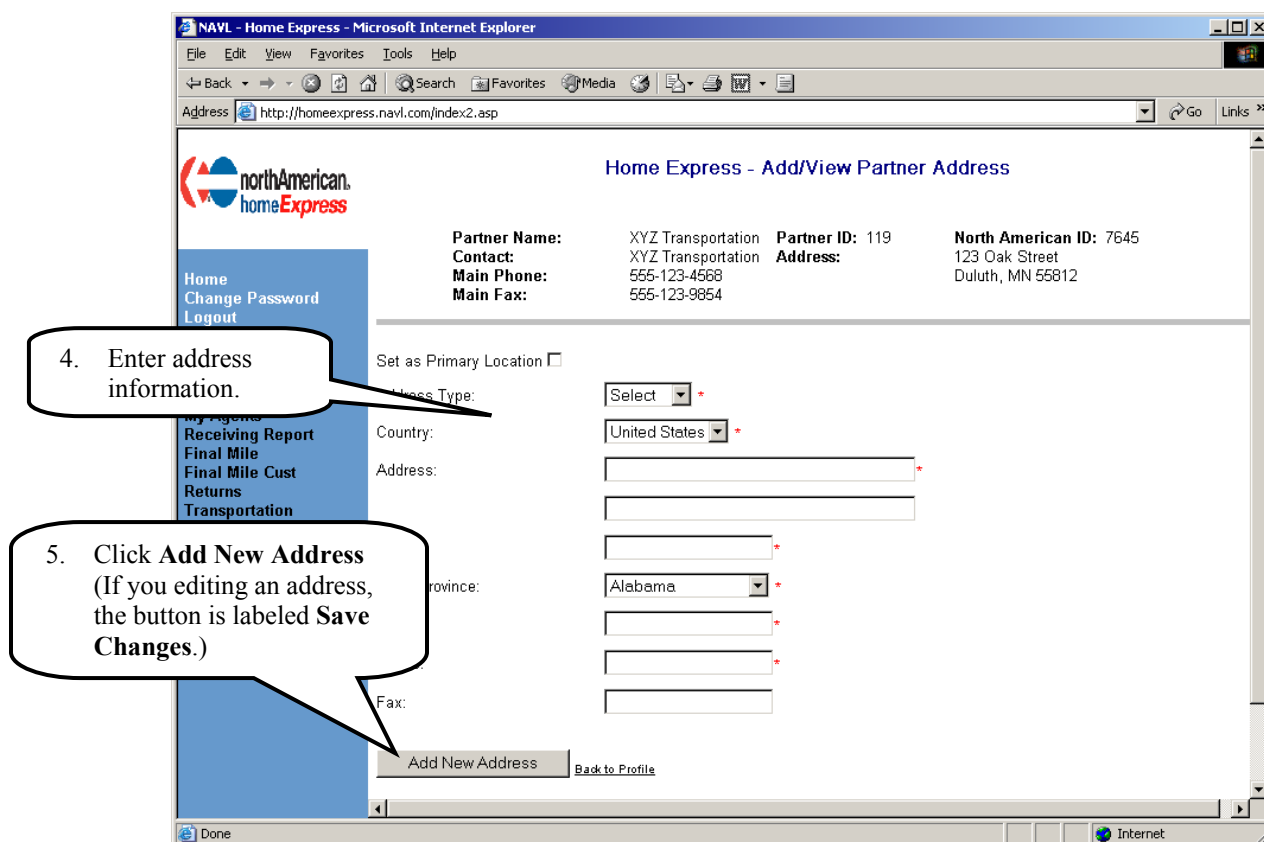


Figure 59—Adding a partner address

Instructions: Adding or Editing Addresses

Use the following steps to enter a new address or edit an existing address. Enter the addresses for all of your agency's locations.

1. In the navigation bar, on the left side of the screen, click **My Agents**.
The system displays the **Partner Profile** screen.
2. If the **Address** tree is collapsed, click the plus sign (+) to expand it.
3. Do one of the following:
 - a. To add a new address, click **Add New**.

Or
 - b. To edit an existing address, click the address.
The system displays the **Add/View Partner Address** screen.
4. Enter address information.
 - a. If this is the primary address, click the **Set as Primary Location** check box.
 **Set as Primary Location** is not available until you have entered at least two addresses.
 - b. Select an address type from the **Address Type** drop-down list.
 - c. Select a country from the **Country** drop-down list.
 - d. Type the address in the *Address* fields.
 - e. Type the city in the *City* field.
 - f. Select the state or province from the **State/Province** drop-down list.
 - g. Type the zip code or postal code in the *Zip* field.
 - h. Type the phone number in the *Phone* field.
 - i. If this location has a fax number, type it in the *Fax* field.
5. Do one of the following:
 - a. If you are entering a new address, click **Add New Address**.
The system saves the address and returns to the **Partner Profile** screen.
Or
If you are editing an existing address, click **Save Changes**.
The system saves the address and returns to the **Partner Profile** screen.

Field Table: Add/View Partner Address Screen

The following fields are used on the Add/View Partner Address screen.

Table 21—Add/View Partner Address screen field definitions

Field Name	Description	Field Type	Notes
Partner Name	Name of the agent.	Display only	
Partner ID	ID number used to uniquely identify an agent partner in the Home Express system.	Display only	
North American ID	ID number used to identify the agent partner. Assigned by North American Van Lines.	Display only	
Contact	Name of the agent partner.	Display only	
Address	Main address for the agent partner.	Display only	
Main Phone	Phone number of the agent partner's main address.	Display only	
Main Fax	Fax number of the agent partner's main address.	Display only	
Set as Primary Location	Check box indicating whether the address is the primary address.	Optional	This option is not available until you have entered at least two addresses. There can only be one primary location at a time.
Address Type	Drop-down list of possible types of addresses.	Required	Possible values: • Main • Bill • Alt • Ware • Proj • Remit To • Orig • Dest
Country	Drop-down list of possible countries.	Required	Defaults to <i>United States</i> . At this time, there are only two options: • United States • Canada
Address	Address of the location.	Required	
Address, line 2	Second line of the address of the location.	Optional	

Field Name	Description	Field Type	Notes
City	City of the agent partner location.	Required	
State/Province	State or province of the agent partner location.	Required	The information displayed depends on the country selected. If you selected United States, the list includes the 50 states, the District of Columbia, Guam and Puerto Rico. If you selected Canada, the list includes Canadian provinces and territories.
Zip	The Zip code or postal code for the agent partner address.	Required	
Phone	The main phone number for the agent partner address.	Required	Additional phone numbers can be added using the contact list.
Fax	The main fax number for the agent partner address.	Optional	Additional fax numbers can be added using the contact list.

Conclusion

The Partner Profile and the corresponding sub-options contain valuable information that is used throughout the Home Express system. If the information is incorrect, it should be updated. You can correct some of the information yourself. If you have trouble making corrections or the information is in an area that you cannot edit, please contact the Fort Wayne coordinator.

Entering Orders

Description

An order is a request from an account to perform a service. There are four types of orders you might enter:

- *Final Mile* orders are requests to move product from the agent partner location to the consignee's location.
- *Final Mile Customer* orders are requests to move product from an account location to a consignee's location. They are called *final mile customer* because the product is picked up at the account location and the account is our customer. These orders are usually performed for an agent partner's local account.
- *Returns* orders are requests to pick up product at a consignee's location and return it to the agent partner location. The product might or might not have been originally delivered on a home express order.
- *Transportation* orders are requests to move product from an account location to another location. The destination can be a different account location, an agent partner location, or any other specified location. These orders are usually entered and managed by the Fort Wayne coordinator. The information is included in this manual in case you need it in the future.

The order entry procedure is very similar for all of the orders. You enter the details of the order in the fields provided and then submit the order. Once the order has been submitted, it shows up in the Operations Planning screen for the partner that will perform the service.

This section of the manual describes the order entry procedures for the four different order types.

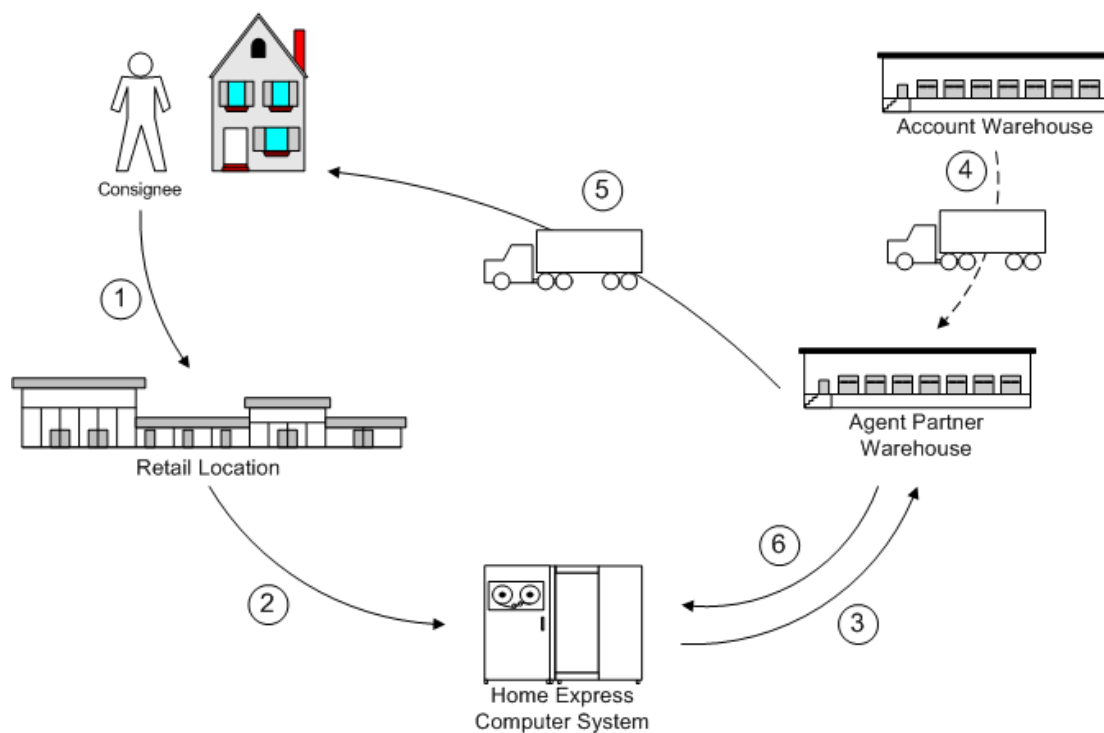


Figure 60—Final Mile Order process flow diagram

Working with Final Mile Orders

Understanding the Final Mile Order Process Flow

See Figure 60 on the facing page. The process for Final Mile orders includes the following steps:

1. The consignee orders a product from an account. The order might be placed at a retail location, on a Web site, over the phone, etc.
2. The account gathers the required information from the consignee. The account contacts a Home Express representative—either a coordinator or a booking agent—and places the order. Also, an account might use the Home Express Web site to enter orders.
3. The order is automatically communicated to the agent partner that will make the delivery. The agent partner sees the order on the Home Express Home screen.
4. The product is moved from the account's warehouse or manufacturing location to the agent partner's location. If the account requests transportation, a coordinator creates a transportation order in Home Express. The account doesn't have to use Home Express to move the product.
5. The agent partner notifies the consignee that the product has arrived and plans the delivery. The agent partner delivers the product.
6. After the delivery, the agent partner updates Home Express with the actual date and time of the delivery and the proof-of-delivery information.

1. Click Final Mile.

CAC Code	Order #	Consignee	Address/City/State	Zip	Order Type	Order Status	Freight Available	Actual SetOff	Est. Del. Date	Req. Del. Time	Weight	Map C
ACHF	1386	Transportation	125 Peppermint Lane Duluth MN	55811	Transportation	Open	3/19/2003		3/19/2003		100	
ACHF	1382	Transportation	125 Peppermint Lane Duluth MN	55811	Transportation	Set Off	3/19/2003		3/19/2003		100	
ACHF	1381	Transportation	125 Peppermint Lane Duluth MN	55811	Transportation	Set Off	3/19/2003		3/19/2003		100	
ACHF	1380	Transportation	125 Peppermint Lane Duluth MN	55811	Transportation	Open	3/19/2003		3/19/2003		100	
CECM	1379	Carol cowden	652 maple drive duluth MN	55810	Final Mile Customer Whse	Set Off	3/18/2003	3/18/2003	3/23/2003	8:00	51	

Figure 61—Operations Home screen

2. Type the account number.

3. Enter Vendor/Ship To information.

Account Number:

Account Search:

Vendor/Ship To:

Consignee:

Address:

Address 2:

City:

State: Zip:

Country:

Contact Name:

Phone:

Cell Phone:

Work Phone:

Email Address:

Account Instructions:

Order Information:

Acct. Ref. #:

Booking Agent:

Booker Phone:

Contact:

Provider Agent:

Contact:

Provider Phone:

Provider Search:

Freight Available:

Est. Delivery Date:

Request Del. Time:

Order Notes:

Product Information

Product:

Selected Products:

Figure 62—Final Mile Order Entry screen

Instructions: Entering Final Mile Orders

Use these steps when entering an order to move product from the agent partner location to a consignee's location.

1. From the navigation bar on the left, click **Final Mile**.
The system displays the **Final Mile Order Entry** screen.

2. Do one of the following:

- a. If you know the account number:

- 1) Type the account number in *Account Number* field.
- 2) Press **Tab**.

Or

- b. If you don't know the account number:

- 1) Click **Search**.
- 2) Search for and then select an account.

See "Searching for Information" on page 79 for instruction on how to search.

As soon as you press **Tab** to leave the *Account Number* field, the system fills in the following information: the account name, the product list for this account, the account instructions and the booking agent information.

3. Enter data in the *Vendor/Ship To* fields.

- a. Type the consignee's name in the *Consignee* field.
- b. Type the consignee's address in the *Address* field
- c. Type the consignee's city in the *City* field
- d. Select the consignee's state from the **State** drop-down list.
- e. Type the consignee's zip code in the *Zip* field.

As soon as you press **Tab** to leave the *Zip* field, the system copies the consignee name to the *Contact Name* field, fills in the booking agent information and the default provider information.

- f. Select the consignee's country from the **Country** drop-down list.
- g. Type the name of the contact person in the *Contact Name* field.
- h. Type the contact person's phone number in the *Phone* field.

Final Mile Order Entry

Account Number: Account Search:

Vendor/Ship To:

Consignee:
 Address:
 Address 2:
 City:
 State: Zip:
 Country:

Order Information:

Acct. Ref. #:
 Booking Agent:
 Booker Phone:
 Contact:
 Provider Agent:
 Contact:
 Provider Phone:
 Provider Search:
 Freight Available:
 Est. Delivery Date:
 Request Del. Time:

Order Notes:

Product Information

Product:

Selected Products:

7. Click Add.

6. Select products from the product list.

5. Type order notes.

4. Enter Order Information.

3. Enter Vendor/Ship To information.

Figure 63—Final Mile Order Entry screen

- i. If available, type the contact person's cell phone number in the *Cell Phone* field.
- j. If available, type the contact person's work phone number in the *Work Phone* field.
- k. If available, type the contact person's email address in the *Email Address* field.

4. Enter data in the *Order Information* fields.

- a. Type the reference number provided by the account in the *Acct. Ref. #* field.



You cannot change the booking agent information.

- b. Do one of the following:

- 1) If the default provider is the correct provider, go to the next step.

Or

- 2) If the default provider is not the correct provider, click **Search** and then search for a provider. See "Searching for Information" on page 79 for instruction on how to search.

- c. Type the date that the freight will arrive at the agent location in the *Freight Available* field.

As soon as you press **Tab** to leave the *Freight Available* field, the system fills in *Est. Delivery Date* field.

- d. If the estimated delivery date filled in by the system is not correct, type the correct date in the *Est. Delivery Date* field.
- e. Type the delivery time specified by the consignee in the *Req. Del. Time* field.

5. If there are any special instructions for this order, type them in the *Order Notes* field.

6. Select one or more products from the product list.

7. Click **Add**.

The system displays the names of the products you selected in the *Selected Products* list.



If you need to delete a product after you have selected it, highlight it in the *Selected Products* list by clicking on it, then click **Remove**.

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Final Mile Order Entry

Account Number: **Account Search:**

Vendor/Ship To:

Consignee:
 Address:
 Address 2:
 City:
 State: Zip:
 Country:
 Contact Name:
 Phone:
 Cell Phone:
 Work Phone:
 Email Address:

Order Information:

Acct. Ref. #:
 Booking Agent:
 Booker Phone:
 Contact:
 Provider Agent:
 Contact:
 Provider Phone:
 Provider Search:
 Freight Available:
 Est. Delivery Date:
 Request Del. Time:

Product Information

Product:

Selected Products:

Account Instructions:

Order Notes:

Intelli-Search: A - Account, P - Partner, O - Order, I - Invoice, R - Acct Ref #

Internet

8. Click **Submit Order**.

Figure 64—Final Mile Order Entry screen

8. Click **Submit Order**.

The system saves the order and then displays the **Details II** screen.

Or

Click **Submit and Add Additional Order**.

The system saves the order and then redisplay the **Final Mile Order Entry** screen so that you can add another order.

Field Table: Final Mile Order Entry screen

The following fields are used on the Final Mile Order Entry screen.

Table 22—Final Mile Order Entry screen field definitions

Field Name	Description	Field Type	Notes
Account Number	Identification number for the account that is shipping products to the consignee.	Required	After you type or select the account number, the system retrieves the following information: • The account name. • The product list for the account. • The booking agent name, phone number and contact information. • Any account instructions for this account. Booking agent information and account instructions are not always displayed for an account.
Consignee	Name of person or company the account is shipping product to.	Required	
Address	First line of the address of the consignee.	Required	
Address 2	Second line of the address of the consignee.	Optional	
City	City of the consignee.	Required	
State	State of the consignee.	Required	
Zip	Zip code of the consignee.	Required	When you type the zip code for the consignee and then press Tab, the system automatically fills in the default provider information.
Country	Country of the consignee, default is United States.	Required	The default value is <i>United States</i> . Possible values are: • United States • Canada
Contact Name	Name of contact person at the consignee's location. May or may not be the consignee.	Required	
Phone	Phone number of the contact person.	Required	

Field Name	Description	Field Type	Notes
Cell Phone	Cellular phone number of the contact person.	Optional	
Work Phone	Work phone number of the contact person.	Optional	
Email Address	Email address of the contact person.	Optional	
Account Instructions	Any special instructions or comments that apply to all deliveries for this account.	Display only	Account instructions are entered on the account profile. They are instructions that apply to all orders for an account.
Acct. Ref. #	Number, such as a purchase order number or tracking number, used by the account to reference this order. This number is provided by the account.	Optional	
Booking Agent	Name of the booking agent for this account.	Display only. If a booking agent is set up for this account, the system displays this information automatically.	
Booker Phone	Phone number of the booking agent contact person.	Display only. If a booking agent is set up for this account, the system displays this information automatically.	
Contact	Name of person at the booking agent location that can be contacted about this account.	Display only. If a booking agent is set up for this account, the system displays this information automatically.	
Provider Agent	Name of agent partner who will deliver the product to the consignee.	Required	If the default provider supplied by the system is not the correct provider, click the Provider Search button to choose a different provider.
Contact	Name of person at the agent partner location that can be contacted about this order.	Optional	

Field Name	Description	Field Type	Notes
Provider Phone	Phone number of agent partner contact person.	Optional	
Freight Available	Estimated date on which the freight will arrive at the agent partner location.	Required	
Est. Delivery Date	Estimated date on which the product will arrive at the agent partner location.	Calculated/Optional	When an account profile is created, one piece of data entered is <i>Days From Delivery</i> which indicates the maximum number of days allowed between when the product arrives at the partner location and when it is delivered to the consignee. The Est. Delivery Date is calculated as the freight available date plus days from delivery. The system is set up to work with a 6-day workweek. Sundays are excluded from this calculation. If days from delivery in the account profile is zero (0) or blank, the system makes the estimated delivery date equal to the freight available date. Estimated delivery date can be typed in manually. If the calculated date is not correct, type the correct date in the field.
Request Del. Time	Time of day when the consignee would prefer the delivery to take place.	Optional	This is a free-form text field. You can type the time in any format that is needed. For example, you could enter a time range such as 8-11AM or text such as Morning .
Order Notes	Any special instructions or comments that apply to this order.	Optional	Free-form text field.
Product	List of products that we deliver for this account.	Display	

Field Name	Description	Field Type	Notes
Selected Products	Products that will be delivered to consignee. Products are selected from the product list.	Required	At least one product must be selected.

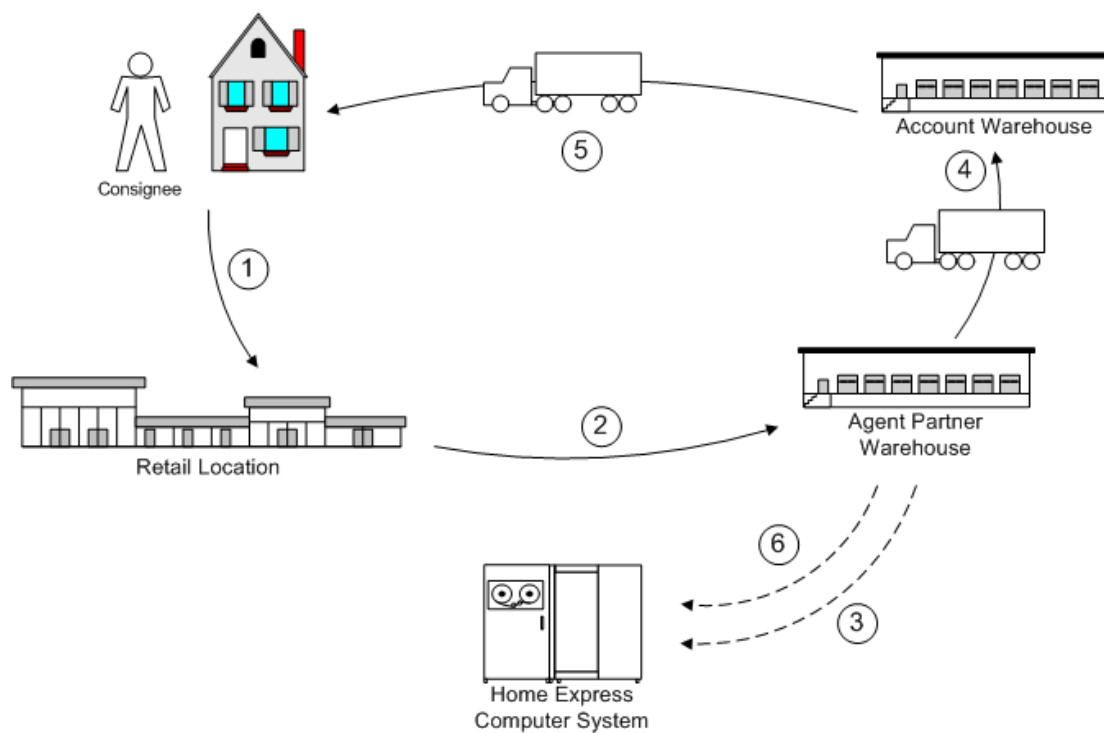


Figure 65—Final Mile Customer Order process flow diagram

Working with Final Mile Customer Orders

Understanding the Final Mile Customer Order Process Flow

Final Mile Customer orders are usually used when an agent partner performs work for a local account. The process for Final Mile Customer orders includes the following steps:

1. The consignee orders a product from an account. The order might be placed at a retail location, on a Web site, over the phone, etc.
2. The account gathers the required information from the consignee. The account contacts the agent partner and places the order.
3. Using Home Express for local accounts is optional. The advantage of Using Home Express is that local account deliveries can be planned and managed at the same time as national account deliveries.
4. The agent partner goes to the account location and picks up the product. The account location could be a retail location, a warehouse, or another location.
5. The agent partner moves the product to the consignee's location. The product doesn't pass through the agent partner's warehouse.
6. If the agent partner elected to use Home Express to manage the local delivery, they are required to update the order with the actual date and time of the delivery and the proof-of-delivery information.

1. Click Final Mile Cust.

Order #	Consignee	Address/City/State	Zip	Order Type	Order Status	Freight Available	Actual Set Off	Est. Del. Date	Req. Del. Time	Weight	Map C
1386	Transportation	125 Peppermint Lane Duluth MN	55811	Transportation	Open	3/19/2003		3/19/2003		100	
1382	Transportation	125 Peppermint Lane Duluth MN	55811	Transportation	Set Off	3/19/2003		3/19/2003		100	
1381	Transportation	125 Peppermint Lane Duluth MN	55811	Transportation	Set Off	3/19/2003		3/19/2003		100	
1380	Transportation	125 Peppermint Lane Duluth MN	55811	Transportation	Open	3/19/2003		3/19/2003		100	
1379	Carol Cowden	652 maple drive duluth MN	55810	Final Mile Customer Whse	Set Off	3/18/2003	3/18/2003	3/23/2003	8:00	51	

Figure 66—Operations Home screen

2. Type the account number.

3. Type the Vendor/Ship From information.

Account Number:

Account Search:

Vendor Ship/From:

Warehouse:

Whse Address:

Bldg #:

City:

State: Zip:

Country:

Whse Contact:

Whse Phone:

Transportation:

Ship To:

Consignee:

Address:

Apt. #:

City:

State: Zip:

Country:

Contact Name:

Contact Phone:

Cell Phone:

Work Phone:

Email Address:

Order Information:

Acct. Ref. #:

Booking Agent:

Booker Phone:

Booker Contact:

Provider Agent:

Provider Contact:

Provider Phone:

Provider Search:

Freight Available:

Est. Delivery Date:

Request Del. Time:

Account Instructions:

Order Notes:

Product Information

Product:

Selected Products:

Figure 67—Account Warehouse Final Mile Order Entry screen

Instructions: Entering Final Mile Customer Orders

Use these steps to create a final mile customer order:

1. From the navigation bar on the left, click **Final Mile Cust.**
The system displays the **Account Warehouse Final Mile Order Entry** screen.
2. Do one of the following:
 - a. If you know the account number
 - 1) Type the account number in *Account Number* field.
 - 2) Press **Tab**.
Or
 - b. If you do not know the account number
 - 1) Click **Search**.
 - 2) Search for and select an account.
See “Searching for Information” on page 79 for instruction.
 - If there are any warehouse locations for this account in the system, the system displays them in the warehouse drop-down list.
 - If there are no warehouse locations for this account in the system, then the system displays the message “No WAREHOUSES Found For This Account NUMBER – Select “New” to ADD Information.”
 - If applicable to this account, the system displays the booking agent information. The system also displays the list of products for the account and any standard account instructions.
3. Enter data in the *Vendor/Ship From* fields.
 - a. Select an origin location from the **Warehouse** drop-down list.
Or
 - b. If the origin location is not in the list, click **New** and then, type the origin address, etc. in the fields provided.
 - 1) Type the warehouse name in the *Warehouse Name* field.
 - 2) Type the warehouse address in the *Warehouse Address* field.
 - 3) Type the warehouse building number in the *Bldg. #* field
 - 4) Type the warehouse city in the *City* field.
 - 5) Select the warehouse state from the **State** drop-down list.

NAVL - Home Express - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Stop Search Favorites Media Address http://hdntest.sirva.com/index2.asp Go

Account Warehouse Final Mile Order Entry

Account Number: Account Search:

Vendor Ship/From:

Warehouse: Consignee:

Whse Address: Address:

Bldg #: Apt. #:

City: City:

State: Zip: State: Zip:

Country: Country:

Whse Contact: Contact Name:

Whse Phone: Contact Phone:

Cell Phone: Work Phone:

Transportation: Email Address:

Order Information:

Acct. Ref. #:

Booking Agent:

Booker Phone:

Booker Contact:

Provider Agent:

Provider Contact:

Provider Phone:

Provider Search:

Freight Available:

Est. Delivery Date:

Request Del. Time:

Account Instructions:

Order Notes:

Product Information

Product:

Selected Products:

Home

Final Mile

Final Mile Cust

Returns

Transportation

Create Account

Contact Us

FAQ

Reference Manual

3. Enter the Vendor/Ship From information.

4. Enter the Ship To information.

Figure 68—Account Warehouse Final Mile Order Entry screen

- 6) Type the warehouse zip code in the *Zip* field
- 7) Select the warehouse country from the **Country** drop-down list.
- 8) Type the name of the warehouse contact person in the *Whse Contact* field.
- 9) Type the warehouse contact person's phone number in the *Whse Phone* field.



When the order is saved, the system also saves the warehouse information. You can then use this warehouse entry the next time you enter an order.

- 10) Select an option from the Transportation drop-down list.
 - NAVL
 - One Time NAVL Rate
 - Other
4. Enter data about the consignee in the *Ship To* fields.
 - a. Type the consignee's name in the *Consignee* field.
 - b. Type the consignee's address in the *Address* field.
 - c. If the consignee lives in an apartment, type the apartment number in the *Apt. #* field.
 - d. Type the consignee's city in the *City* field.
 - e. Select the consignee's state from the **State** drop-down list.
 - f. Type the consignee's zip code in the *Zip* field.

As soon as you press **Tab** to leave the *Zip* field, the system fills in the default provider information.
 - g. Select the consignee's country from the **Country** drop-down list.
 - h. Type the name of the contact person in the *Contact Name* field.
 - i. Type the contact person's phone number in the *Contact Phone* field.
 - j. Type the contact person's cell phone number in the *Cell Phone* field.
 - k. Type the contact person's work phone number in the *Work Phone* field.
 - l. Type the contact person's email address in the *Email Address* field.

The screenshot shows a web browser window titled "NAVL - Home Express - Microsoft Internet Explorer". The address bar shows "http://hdntest.sirva.com/index2.asp". The page title is "Account Warehouse Final Mile Order Entry".

Account Information:

- Account Number:
- Account Search:

Vendor Ship/From:

- Warehouse:
- Whse Address:
- Bldg #:
- City:
- State: Zip:
- Country:
- Whse Contact:
- Whse Phone:

Ship To:

- Consignee:
- Address:
- Apt. #:
- City:
- Country:
- Contact Name:
- Contact Phone:
- Cell Phone:
- Work Phone:
- Email Address:

Order Information:

- Acct. Ref. #:
- Booking Agent:
- Booker Phone:
- Booker Contact:
- Provider Agent:
- Provider Contact:
- Provider Phone:
- Provider Search:
- Freight Available:
- Est. Delivery Date:
- Request Del. Time:

Account Instructions:

Order Notes:

Product Information

Product:

Selected Products:

Buttons:

- Add >>
- << Remove
- Submit Order
- Submit and Add Additional Order

Callouts:

- Enter the Order Information.
- Type Additional Instructions.
- Select one or more products from the Product list.
- Click Add.
- Click Submit Order.

Figure 69—Account Warehouse Final Mile Order Entry screen

5. Enter data in the *Order Information* fields.
 - a. Type the reference number provided by the account in the *Acct. Ref. #* field.
 You cannot change the booking agent information.
 - b. Do one of the following:
 - 1) If the default provider is the correct provider, go to the next step.
Or
 - 2) If the default provider is not the correct provider, click **Search** and then search for a provider. See “Searching for Information” on page 79 for instruction on how to search.
 - c. Type the date that the freight will arrive at the agent location in the *Freight Available* field.
As soon as you press **Tab** to leave the *Freight Available* field, the system fills in *Est. Delivery Date* field.
 - d. If the estimated delivery date filled in by the system is not correct, type the correct date in the *Est. Delivery Date* field.
 - e. Type the delivery time specified by the consignee in the *Request. Del. Time* field.
6. If there are any special instructions for this order, type them in *Order Notes* field.
7. Select one or more products from the product list.
8. Click **Add**.
The system displays the names of the products you selected in the *Selected Products* list.
 If you need to delete a product after you have selected it, highlight it in the *Selected Products* list by clicking on it, then click **Remove**.
9. Click **Submit Order**.
The system saves the order and then displays the **Details II** screen.
Or
Click Submit and Add Additional Order.
The system saves the order and then redisplay the **Account Warehouse Final Mile Order Entry** screen.

Field Table: Account Warehouse Final Mile Order Entry Screen

The following fields are used on the Account Warehouse Final Mile Order Entry screen.

Table 23—Account Warehouse Final Mile Order Entry screen field definitions

Field Name	Description	Field Type	Notes
Account Number	Sequential number used to identify the account within the Home Express system. Assigned by the system when the account profile is originally created.	Required	After you type or select the account number, the system retrieves the following information: • The account name. • The account warehouse locations. • The product list for the account. • The booking agent name, phone number and contact information. • Account instructions for this account. Booking agent information and account instructions are not always displayed for an account.
Warehouse	Name of a warehouse or other account location that is the origin location for the shipment.	Required, defaults to first warehouse in the list of warehouses for this account.	Warehouse is a drop-down list of location names. If you select a name from the list, the system fills in the warehouse address information. If you select New, the system leaves the warehouse address fields blank. You then type the address information for the new location. The new address is saved as part of the account profile.
Whse. Address	Address of the warehouse where product will be picked up.	Display only when you select an existing warehouse. Required when entering a new warehouse.	

Field Name	Description	Field Type	Notes
Bldg. #	Second line of the address of the warehouse where product will be picked up.	Display only when you select an existing warehouse. Required when entering a new warehouse.	
City	City of the warehouse where product will be picked up.	Display only when you select an existing warehouse. Required when entering a new warehouse.	
State	State of the warehouse where product will be picked up.	Display only when you select an existing warehouse. Required when entering a new warehouse.	
Zip	Zip code of the warehouse where product will be picked up.	Display only when you select an existing warehouse. Required when entering a new warehouse.	
Country	Country of the warehouse where product will be picked up. United States is the default.	Display only when you select an existing warehouse. Required when entering a new warehouse.	
Whse Contact	Name of a contact person at the warehouse where product will be picked up.	Displayed by the system when using an existing warehouse. Required when entering a new warehouse.	
Whse Phone	Phone number of warehouse contact person.	Display only when you select an existing warehouse. Required when entering a new warehouse.	

Field Name	Description	Field Type	Notes
Transportation	Selection option that allows you to choose which rate is charged for the shipment.	Optional	Default value is NAVL. Possible values are: • NAVL—automatically generates transportation charges for this order based on the current rate tables. For NAVL shipments only. • NAVL One Time Rate—used to record NAVL transportation costs when they are not based on the current rate tables. When you select this option, the system displays the Transportation cost field in which you type the amount. • Other—Used when another company (other than NAVL) provides the transportation for the order. The system doesn't calculate the transportation costs automatically.
Consignee	Name of person or company the account is shipping product to.	Required	
Address	Address of consignee.	Required	
Apt. #	Second address line for consignee's address.	Required	
City	City where product will be delivered to the consignee.	Required	
State	State where product will be delivered to the consignee.	Required	
Zip	Zip code where product will be delivered to the consignee.	Required	When you type the zip code for the consignee and then press Tab, the system automatically fills in the default provider information.
Country	Country where product will be delivered to the consignee.	Required	

Field Name	Description	Field Type	Notes
Contact Name	Name of contact person at the consignee's location. May or may not be the same as the consignee.	Required	
Contact Phone	Phone number of the contact person.	Required	
Cell Phone	Cellular phone number of the contact person.	Optional	
Work Phone	Work phone number of the contact person.	Optional	
Email Address	Email address of the contact person.	Optional	
Acct. Ref. #	Number, such as a purchase order number or tracking number, used by the account to reference this order. This number is provided by the account.	Optional	
Booking Agent	Name of the booking agent for this account. If no booking agent was set up for this account, then this field is left blank.	Display only	If a booking agent is set up for this account, the system displays this information automatically.
Booker Phone	Phone number of the booking agent contact person. If no booking agent was set up for this account, then this field is left blank.	Display only	If a booking agent is set up for this account, the system displays this information automatically.
Booker Contact	Name of person at the booking agent location that can be contacted about this account. If no booking agent was set up for this account, then this field is left blank.	Display only	If a booking agent is set up for this account, the system displays this information automatically.
Provider Agent	Name of agent or other provider who will deliver the product to the consignee.	Required	When the consignee's zip code is entered, the system displays the default provider agent. If the default is not the correct provider, click Search to select a different provider.

Field Name	Description	Field Type	Notes
Provider Contact	Name of person at the agent location that can be contacted about this account.	Optional	
Provider Phone	Phone number of provider agent contact person.	Optional	
Freight Available	Estimated date on which the freight will be available for delivery.	Required	
Est. Delivery Date	Estimated date on which the product will arrive at the agent partner location.	Optional	When an account profile is created, one piece of data entered is the <i>Days From Delivery</i> which indicates the maximum number of days allowed between when the product arrives at the partner location and when it is delivered to the consignee. The Est. Delivery Date is calculated as the freight available date plus days from delivery. The system is set up to work with a 6-day workweek. Sundays are excluded from this calculation. If days from delivery in the account profile is zero (0) or blank, the system makes the estimated delivery date equal to the freight available date. Estimated delivery date can be typed in manually. If the calculated date is not correct date, type the correct date in the field.
Request Del. Time	Time of day when the consignee would prefer the delivery to take place.	Optional	This is a free-form text field. You can type the time in any format that is needed. For example, you could enter a time range such as 8-11AM or text such as Morning. Req. is an abbreviation for <i>requested</i> not <i>required</i>.

Field Name	Description	Field Type	Notes
Account Instructions	Any special instructions or comments that apply to all deliveries for this account.	Display only	They are setup on the Account Profile screen.
Order Notes	Any special instructions or comments that apply to this delivery.	Optional	Free-form text field.
Product	List of products that we deliver for this account.	Display only	
Selected Products	Products that will be delivered to consignee. Products are selected from the product list.	Required	At least one product must be selected.

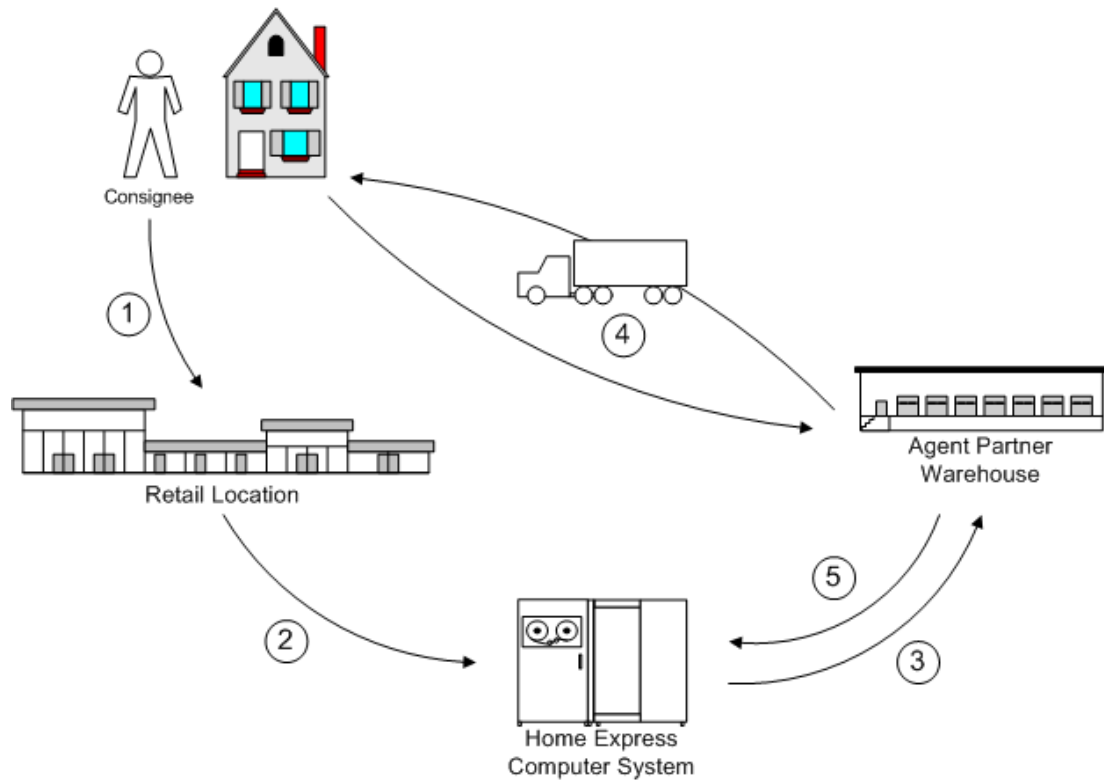


Figure 70—Returns Order process flow diagram

Working with Returns Orders

Understanding the Returns Order Process Flow

Returns orders are used when an account requests that we pick up product at the consignee's location. The process for Returns orders includes the following steps:

1. The consignee contacts the account and arranges for the product to be returned.
2. The account gathers the required information from the consignee. The account contacts a Home Express representative—either a coordinator or a booking agent—and places the order. Also, an account might use the Home Express Web site to enter orders.
3. The order is automatically communicated to the agent partner that will pick up the product. The agent partner sees the order on the Home Express Home screen. It is included with other orders for deliveries so that the agent partner can plan the pickups and deliveries at the same time.
4. The agent partner notifies the consignee that the product will be picked up and plans a date and time for the pick up. The agent partner goes to the consignee location, picks up the product and then returns to the warehouse.
5. After the pick up, the agent partner updates Home Express with the actual date and time of the pick up and the proof-of-delivery information.

1. Click Returns.

Home Express - Operation's Home

Order Status: Shipment Planning

SCAC Code	Order #	Consignee	Address/City/State	Zip	Order Type	Order Status	Freight Available	Actual Set Off	Est. Del. Date	Req. Del. Time	Weight	Map C
ACHF	1386	Transportation	125 Peppermint Lane Duluth MN	55811	Transportation	Open	3/19/2003		3/19/2003		100	
ACHF	1382	Transportation	125 Peppermint Lane Duluth MN	55811	Transportation	Set Off	3/19/2003		3/19/2003		100	
ACHF	1381	Transportation	125 Peppermint Lane Duluth MN	55811	Transportation	Set Off	3/19/2003		3/19/2003		100	
ACHF	1380	Transportation	125 Peppermint Lane Duluth MN	55811	Transportation	Open	3/19/2003		3/19/2003		100	
CECM	1379	Carol Cowden	652 maple drive duluth MN	55810	Final Mile Customer Whse	Set Off	3/18/2003	3/18/2003	3/23/2003	8:00	51	
CECM	1378	Carolyn Franklin	652 Maple Drive Duluth MN	55810	Final Mile Customer Whse	Open	3/18/2003		3/23/2003	08:00	51	
ACHF	1377	Carol Ann Cowden	854 pine avenue duluth MN	55810	Final Mile	Set Off	3/18/2003		3/23/2003	9:30	56	
ACHF	1376	Carolyn Franklin	854 Pine Avenue Duluth MN	55810	Final Mile	Set Off	3/18/2003		3/23/2003	09:30	83	
ACHF	1375	Carolyn Franklin	123 Oak Street Duluth MN	55812	Final Mile	Set Off	3/18/2003		3/23/2003	13:00	180	
ACHF	1374	Carol Cowden	123 Oak Street Duluth MN	55812	Final Mile	Set Off	3/18/2003		3/23/2003	13:00	180	
ACHF	1373	Juddy Harris	123 Oak Street Duluth MN	55812	Returns	Open	3/14/2003				12	
CECM	1372	John Fyfe	652 Maple Drive Duluth MN	55810	Returns	Open	3/14/2003				22	

Figure 71—Operations Home screen

2. Type an order number and then click Go.
Or
Type Ship From and Ship To information manually.

Returns

Search for the item to be returned and select Go:

☐ DO NOT BILL

Ship From:		Ship To:		Product Information:	
Account No:		Provider Agent		Cust. Ref. #:	
Account Search	Search	Provider Search	Search	Product:	
Name:		Name:		Return Products	Return Products
Address:		Address:		Weight:	
Address 2:		Address 2:		Location of Product:	
City:		City:		Comments:	
State:		State:		Freight Avail Date:	
Zip:		Zip:			
Country:		Country:			
Contact:		Contact:			
Phone:		Phone:			
Email:		Email:			

Figure 72—Returns screen

Instructions: Entering Returns Orders

Use these steps when entering an order to return product from a consignee to the agent partner location. The steps for entering a returns order vary slightly, depending on whether or not you originally delivered the product to the consignee on a Home Express order.

If the product was delivered on a Home Express order, then the consignee's name, address, etc. and the list of products delivered are already in the system. You can re-use this information on the returns order.

If the product was not delivered on a Home Express order, for example if it was delivered by a third party carrier, then the information about the consignee and the products is not in the system. In that case, you must type all of the order information manually.



If the product was originally delivered on a Home Express order, look up the order number of the delivery before beginning this process.

1. From the navigation bar on the left, click **Returns**.
The system displays the **Returns** screen.
2. Do one of the following:
 - a. Retrieve information from a previous order:
 - 1) Type the order number of the original delivery in the *Order Number* field
 - 2) Click **Go**.
The system retrieves information from the original delivery order and fills in the *Ship From* information and the *Ship To* information.
 - 3) Check the *Ship From* and *Ship To* information for accuracy. If any information has changed or is incorrect, update the information.
Or
 - b. Enter the *Ship From* information and the *Ship To* information manually:
 - 1) Type the *Ship From* information
 - a) Type the account number in the *Account No.* field.
Or
Search for an account by clicking the **Search** button.

The screenshot shows a web browser window titled "NAVL - Home Express - Microsoft Internet Explorer" with the address "http://hdntest.sirva.com/index2.asp". The page is titled "Returns" and contains a form for entering return information. The form is divided into three main sections: "Ship From:", "Ship To:", and "Product Information:". The "Ship From:" section includes fields for Account No., Account Search, Name, Address, Address 2, Zip, Country, Contact, Phone, and Email. The "Ship To:" section includes fields for Provider, Agent, Provider Search, Address, Address 2, City, State, Zip, Country, Contact, Phone, and Email. The "Product Information:" section includes fields for Case Ref. #, Product, Weight, Location of Product, Comments, and Freight Avail Date. There are also buttons for "Search", "Return Products", "Submit Returns", and "Submit and Add Additional Return". A checkbox labeled "DO NOT BILL" is located at the top right of the form. Four numbered instructions are overlaid on the form:

2. Type an order number and then click **Go**.
Or
Type *Ship From* and *Ship To* information manually.
3. Type the product information.
4. If this return should not be billed to the account, click **Do Not Bill**.

Figure 73—Returns screen

- b) Type the consignee's name in the *Name* field.
 - c) Type the consignee's address in the *Address* field and the *Address 2* field.
 - d) Type the consignee's city in the *City* field
 - e) Select the consignee's state from the **State** drop-down list.
 - f) Type the consignee's zip code in the *Zip* field.
 - g) Select the consignee's country from the **Country** drop-down list.
 - h) Type the name of the contact person in the *Contact* field.
 - i) Type the contact person's phone number in the *Phone* field.
 - j) Type the contact person's email address in the *Email* field.
- 2) Use the **Search** button to select a provider.



You must use the **Search** button. You cannot type the provider information manually.

3. Enter the product information:
- a. Type the reference number in the *Cust. Ref. #* field.
 - b. In the **Product** list, select one or more products that will be returned.
 - c. Click **Return Products**.
The system enters the weight of the products in the *Weight* field. The system also displays *Reason* fields as the bottom of the screen.
 - d. Type the location of the product in the *Location* field.
4. If this return order should not be billed to the account, click the Do Not Bill check box.



This field is for the location in the agent warehouse where the product will be stored after it is returned.

- e. If there are any comments for this order, type them in the *Comments* field.
- f. Type the date when the product can be picked up in the *Freight Avail. Date* field.



For example, the account would not be billed if we delivered the wrong product to the consignee by mistake.

NAVL - Home Express - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address http://hndntest.sirva.com/index2.asp

Returns

Please enter the ORDER # of the item to be returned and select Go:

☐ DO NOT BILL

Ship From:	Ship To:	Product Information:
Account No: 241 Account Search Search Name: Bob Jones Address: 123 Pine Avenue Address 2: City: Duluth State: MN Zip: 55810 Country: United States Contact: Bob Jones Phone: (555) 123-4568 Email:	Provider Agent XYZ Transportatic Provider Search Search Name: XYZ Transportatic Address: 432 Peterson Driv Address 2: City: Duluth State: MN Zip: 55189 Country: United States Contact: Henry Davids Phone: 555-986-5214 Email: susan.tarbox@sir	Cust. Ref. #: RMA652 Product: End Table Return Products Return Products Weight: 12 Location of Product: 10101 Comments: Freight Avail Date: 11/12/03

Reason for Returning Products

Product Name	Reason	Comments
End Table	Broken ☐ Damaged in Transit ☐	

5. Enter a reason for the return for each product.

6. Click **Submit Returns**.

Figure 74—Returns screen

5. For each product that is being returned, enter the reason:
 - a. If the product is damaged, click the **Broken** check box.
 - b. Select a reason from the return from the *Reason* drop-down list.
 - c. If there are additional comments about a product, type them in the *Comments* field.
6. Click **Submit**.

The system saves the order and displays the **Details II** screen, which lists order details.

Or

Click **Submit and Add Additional Return**.

The system saves the order and displays the **Returns** screen so that you can enter additional orders.

Field Table: Returns Screen

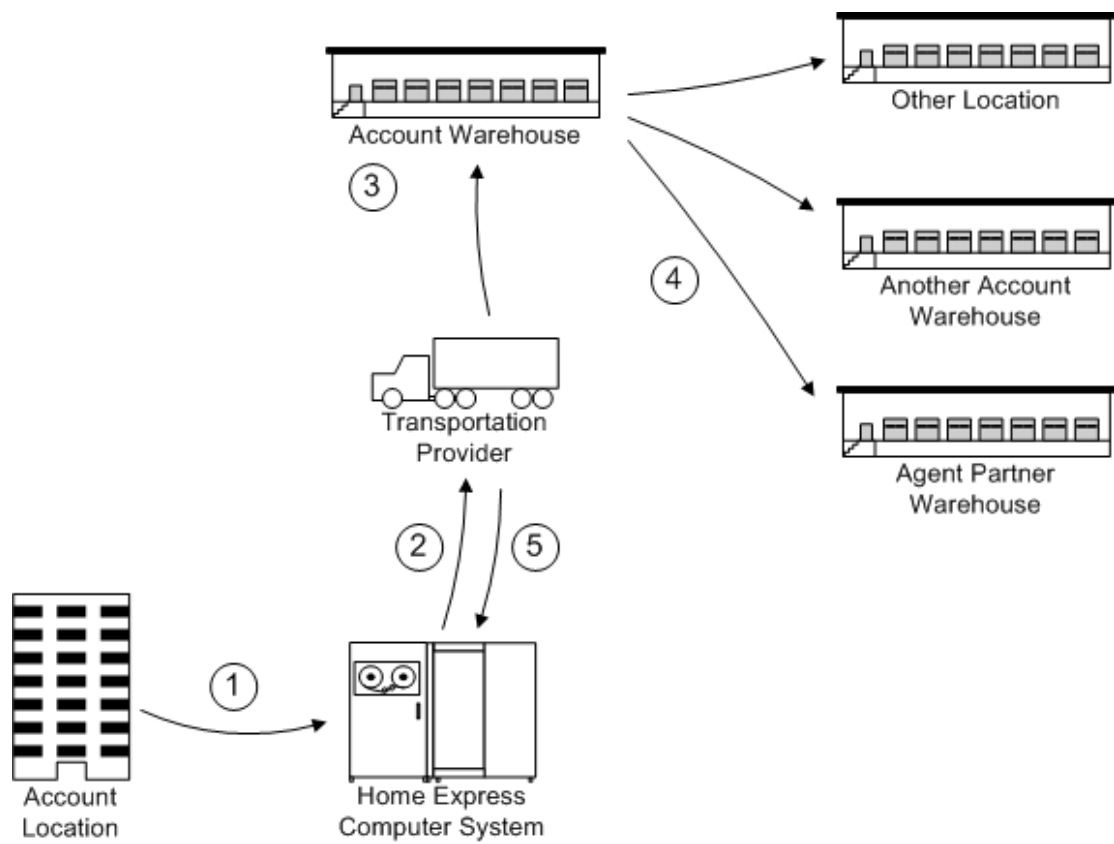
The following fields are used on the Returns screen.

Table 24—Returns screen field definitions

Field Name	Description	Field Type	Notes
Order #	The number of the original delivery order, on which product was delivered to the consignee.	Required	You can look up the order number by using the <i>Search</i> screen.
Do Not Bill	Check box indicating whether or not the account will be billed for this return order.	Optional	For example, we wouldn't bill the account if we delivered the wrong product by mistake.
Account No.	Identification number for the account that is shipping products to the consignee.	Required	If you enter a Home Express order number, the system fills in this field automatically.
Name	Name of person or business returning a product.	Required	If you enter a Home Express order number, the system fills in this field automatically.
Address	First line of the address of the consignee.	Required	If you enter a Home Express order number, the system fills in this field automatically.
Address 2	Second line of the address of the consignee.	Optional	If you enter a Home Express order number, the system fills in this field automatically.
City	City of the consignee.	Required	If you enter a Home Express order number, the system fills in this field automatically.
State	State of the consignee.	Required	If you enter a Home Express order number, the system fills in this field automatically.
Zip	Zip code of the consignee.	Required	If you enter a Home Express order number, the system fills in this field automatically.
Country	Country of the consignee, default is United States.	Required	If you enter a Home Express order number, the system fills in this field automatically.
Contact	Name of contact person at the consignee's location. May or may not be the same as the consignee.	Required	If you enter a Home Express order number, the system fills in this field automatically.
Phone	Phone number of the contact person.	Required	If you enter a Home Express order number, the system fills in this field automatically.

Field Name	Description	Field Type	Notes
Email	Email address of the contact person.	Optional	If you enter a Home Express order number, the system fills in this field automatically.
Provider Agent	Name of the agent or other provider who is picking up the returned product.	Required	If you enter a Home Express order number, the system fills in this field automatically.
Name	Name of the agent location to which the product is being returned.	Required	If you enter a Home Express order number, the system fills in this field automatically.
Address	Address of the provider.	Required	If you enter a Home Express order number, the system fills in this field automatically.
Address 2	Second line of the address of the provider.	Optional	If you enter a Home Express order number, the system fills in this field automatically.
City	City of the provider.	Required	
State	State of the provider.	Required	
Zip	Zip code of the provider.	Required	
Country	Country of the provider, default is United States.	Required	
Contact	Name of contact person at the provider's location. May or may not be the same as the provider.	Required	
Phone	Phone number of the contact person at the provider location.	Required	
Email	Email address of the contact person at the provider location.	Optional	If you enter a Home Express order number, the system fills in this field automatically.
Cust. Ref. #	Number, such as a purchase order number or tracking number, used by the account to reference this order. This number is provided by the account.	Required	

Field Name	Description	Field Type	Notes
Product	List of products that were originally delivered to the consignee, and which could be returned.	Required	At least one product must be selected.
Weight	Total weight of all products selected from the product list.	Display only	After you select products, the system calculates the total weight and enters it in this field.
Location of Product	Location in the warehouse where the returned product will be stored.	Required	
Comments	Any special instructions or comments that apply to this return order. Free-form text field.	Optional	
Freight Avail Date	Estimated date on which the freight is available to be picked up for return to the provider location.	Required	
Product Name	Name of a product you selected to be returned.	Display only	After you select products from the product list, the product names are displayed at the bottom of the screen in the Reason area.
Broken	Check box used to indicate whether the product being returned is broken.	Optional	If a check mark appears in the box, it indicates that the product is broken.
Reason	Reason for the return of this product.	Required	
Comments	Any additional notes or information that applies to this product to be returned.	Optional	Free-form text field. Limit is 50 characters.



Working with Transportation Orders

Understanding the Transportation Order Process Flow

Transportation orders are used when an account requests that we move items from one location to another. They are often used to move product from an account location to an agent provider location. The product is used to fulfill final mile orders. The process for Returns orders includes the following steps:

1. The account contacts the Home Express coordinator. The coordinator takes the information for the order and enters it into the Home Express system.
2. The order is communicated to the transportation provider that will pick up the product. The transportation provider might be a Home Express agent partner or a 3rd party transportation provider. If the transportation provider is an agent partner they will see the order on their Home screen. If the transportation provider is a 3rd party provider that doesn't have access to Home Express, the order is transmitted in another way.
3. The transportation provider goes to the account warehouse location and picks up the product.
4. The transportation provider delivers the product to the designated location.
5. After the delivery, the transportation provider updates Home Express with the actual date and time of the delivery and the proof-of-delivery information. If the transportation provider has access to the Home Express system, they can update the information online. If not, they contact the coordinator, who then updates the order in the system.

1. Click Transportation.

Home Express - Operation's Home

Order Status: Shipment Planning

SCAC Code	Order #	Consignee	Address/City/State	Zip	Order Type	Order Status	Freight Available	Actual Set Off	Est. Del. Date	Req. Del. Time	Weight	Map C
ACHF	1386	Transportation	125 Peppermint Lane Duluth MN	55811	Transportation	Open	3/19/2003		3/19/2003		100	
ACHF	1382	Transportation	125 Peppermint Lane Duluth MN	55811	Transportation	Set Off	3/19/2003		3/19/2003		100	
ACHF	1381	Transportation	125 Peppermint Lane Duluth MN	55811	Transportation	Set Off	3/19/2003		3/19/2003		100	
ACHF	1380	Transportation	125 Peppermint Lane Duluth MN	55811	Transportation	Open	3/19/2003		3/19/2003		100	
CECM	1379	Carol Cowden	652 maple drive duluth MN	55810	Final Mile Customer Whse	Set Off	3/18/2003	3/18/2003	3/23/2003	8:00	51	
CECM	1378	Carolyn Franklin	652 Maple Drive Duluth MN	55810	Final Mile Customer Whse	Open	3/18/2003		3/23/2003	08:00	51	
ACHF	1377	Carol Ann Cowden	854 pine avenue duluth MN	55810	Final Mile	Set Off	3/18/2003		3/23/2003	9:30	56	
ACHF	1376	Carolyn Franklin	854 Pine Avenue Duluth MN	55810	Final Mile	Set Off	3/18/2003		3/23/2003	09:30	83	
ACHF	1375	Carolyn Franklin	123 Oak Street Duluth MN	55812	Final Mile	Set Off	3/18/2003		3/23/2003	13:00	180	
ACHF	1374	Carol Cowden	123 Oak Street Duluth MN	55812	Final Mile	Set Off	3/18/2003		3/23/2003	13:00	180	
ACHF	1373	Juddy Harris	123 Oak Street Duluth MN	55812	Returns	Open	3/14/2003				12	
CECM	1372	John Fyfe	652 Maple Drive Duluth MN	55810	Returns	Open	3/14/2003				22	

Figure 75—Operations Home screen

2. Type an account number.

3. Select a warehouse. Or Select New and then type the warehouse information.

Transportation Order Entry

Account Number: Account Search:

From: Warehouse: Location:

Address: Address:

Address 2: Address 2:

City: City:

State: Zip: State: Zip:

Country: Country:

Whse Contact: Whse Contact:

Phone: Phone:

Email Address: Email Address:

Load Date: Delivery Date:

Carrier: Carrier Ref #: Carrier Name:

Carrier Search: Carrier Contact:

Carrier Phone: Carrier Email:

Weight: Order Notes:

Figure 76—Transportation Order Entry screen

Instructions: Entering Transportation Orders

Use these steps when entering a transportation order. Transportation orders are used for shipments of products from one location to another.

There are two main steps in creating transportation orders: creating the Transportation order and then attaching it to Final Mile and Final Mile Customer orders.

When you create a transportation order, you enter the *From* location and the *To* location. The *From* location is an account location. The *To* location is a different account location, a provider location or another location. You also enter the information for the provider that is transporting the product.

After the transportation order is created, it is attached to Final Mile and Final Mile Customer orders. Attaching to orders tells the system that the product being shipped is allocated to those orders.

When the transportation order is marked *delivered*, indicating that the product has arrived at the partner location, the system changes the status of all attached orders to *set off*. This saves time, especially if the transportation order is attached to a large number of orders.



You can use a transportation order to mark other orders as set off, even if you didn't actually transport the product. You would create a *dummy* transportation order and then attach other orders to it.

1. From the navigation bar on the left, click **Transportation**.
The system displays the **Transportation Order Entry** screen.
2. Type the account number in the *Account Number* field.
 - If there are any warehouse locations for this account in the system, the system displays them in the warehouse drop-down list.
 - If there are no warehouse locations for this account in the system, then the system displays the message “No WAREHOUSES Found For This Account NUMBER – Select “New” To ADD Information.”
3. Enter the *From* information:
 - a. Select a warehouse name from the **Warehouse** drop-down list.
The system displays the warehouse name, address, city, and other information in the fields.

Or
 - b. Select **New** from the **Warehouse** drop-down list and then type in the warehouse information.
 - 1) Type the warehouse name in the *Location Name* field.
 - 2) Type the warehouse address in the *Address* field.

NAVL - Home Express - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Stop Home Search Favorites Media Address http://hdntest.sirva.com/index2.asp Go

Transportation Order Entry

Account Number: Account Search:

From: **To:**

Warehouse: Location:

Address: Address:

Address 2: Address 2:

City: City:

State: Zip: State: Zip:

Country: Country:

Whse Contact: Whse Contact:

Phone: Phone:

Email Address: Email Address:

Load Date: Delivery Date:

Carrier:

Carrier Ref #:

Carrier Name:

Carrier Search:

Carrier Contact:

Carrier Phone:

Carrier Email:

Weight:

Order Notes:

Final Mile
Final Mile Cust
Contact Us
FAQ

3. Select a warehouse.
Or
Select **New** and then
type the warehouse
information.

4. Type the load date.

5. Select a destination
location and then enter
the location information.

Figure 77—Transportation Order Entry screen

- 3) Type the second line of the address in the *Address 2* field.
- 4) Type the warehouse city in the *City* field.
- 5) Select the warehouse state from the **State** drop-down list.
- 6) Type the warehouse zip code in the *Zip* field
- 7) Select the warehouse country from the **Country** drop-down list.
- 8) Type the name of the warehouse contact person in the *Whse Contact* field.
- 9) Type the warehouse contact person's phone number in the *Phone* field.
- 10) Type the warehouse contact person's email address in the *Email Address* field.



When the order is saved, the system also saves the warehouse information. You can then use this warehouse entry the next time you enter an order.

4. Type the date the product will be loaded at the warehouse in the *Load Date* field.
5. Enter the *To* information:
 - a. Select a destination category from the **Location** drop-down list.
Based on your selection, the system displays the To fields.
 - b. If you selected **Warehouse**, do one of the following:
 - 1) Select a warehouse name from the **Warehouse** drop-down list.
The system displays the warehouse name, address, city, and other information in the fields.
 - Or
 - 2) Select **New** from the **Warehouse** drop-down list and then type in the warehouse address and other information.
 - c. If you selected **Provider**, do the following:
 - 1) Click the **Search** button.
 - 2) Search for a partner by Home Express ID, SIRVA ID, or name.
 - 3) From the list of search results, select a partner by clicking on a name.
The system displays the provider information in the fields.
 - d. If you selected **Other**, type the location information in the fields.

6. Type the delivery date.

7. Type the carrier reference number.

8. Select a carrier.

9. Type the product weight.

The screenshot shows the 'Transportation Order Entry' form in a Microsoft Internet Explorer window. The form is divided into three main sections: 'From', 'To', and 'Carrier'. The 'From' section includes fields for Warehouse, Address, Address 2, City, State, Zip, Country, Whse Contact, Phone, Email Address, and Load Date. The 'To' section includes fields for Location, Address, Address 2, City, State, Zip, Country, Whse Contact, Phone, Email Address, and Delivery Date. The 'Carrier' section includes fields for Carrier Ref #, Carrier Name, Carrier Search, Carrier Contact, Carrier Phone, Carrier Email, Weight, and Order Notes. There are also buttons for 'Submit Order' and 'Submit and Add Additional Order'.

Figure 78—Transportation Order Entry screen

10. Type the order notes.

11. Click Submit Order.

This screenshot is identical to the previous one, showing the 'Transportation Order Entry' form. Callout 10 points to the 'Order Notes' text area, and callout 11 points to the 'Submit Order' button.

Figure 79—Transportation Order Entry screen

6. Type the estimated delivery date in the *Delivery Date* field.
7. Type the carrier reference number in the *Carrier Ref.* field.
8. Select a carrier:

- a. Click **Search**.



You must use Search to select a carrier. You cannot type the carrier's information manually.

- b. Search for a partner by Home Express ID, SIRVA ID, or name.
 - c. From the list of search results, select a partner.
The system displays the partner information in the carrier fields.
9. Type the weight in the **Weight** field.
 10. Type any comments or notes in the **Order Notes** field.
 11. Click **Submit Order**.

The system saves the order and displays the **Details II** screen.

Or

Click **Submit and Add Additional Order**.

The system saves the order and stays on the **Transportation Order Entry** screen.

NAVL - Home Express - Microsoft Internet Explorer

Address: http://ndntest.sirva.com/index2.asp

Order ID: 3205

Details II

Customer Name: Joe's Discount Computers Customer ID: 240 SCAC ID: JDCS Business Type: Home Express

Order Type: Transportation

From Location: South Warehouse

From Address: 652 Pine Avenue

From City: Duluth

From State: Minnesota

From Zip: 55810

From Country: United States

From Contact: Bob Wilson

From Phone: (555) 458-9542

To Location:

Status: Open

To Address: 432 Peterson Drive

To City: Duluth

To State: Minnesota

To Zip: 55189

To Country: United States

Contact Name: Henry Davids

Phone: (555) 986-5214

Actual Setoff:

Account Instructions:

Carrier Ref #: T5-85452

Load Date: 11/12/2003

Delivery Date: 11/13/2003

Weight: 54

BOS Contract:

View Attach Orders

Survey History Comments Save

Figure 80—Details II screen for a transportation order

NAVL - Home Express - Microsoft Internet Explorer

Address: http://ndntest.sirva.com/index2.asp

Order ID: 3207

Home Delivery Network

Attach Orders to Transportation Order

Account Number: 241 Transportation Order #: 3207 Delivery Provider: 228 Show Orders Search

Attach Order ☐

Order Number 3206

Consignee Bob Jones

Account Name Acme Home Furnishings

Attach and Unattach Orders

Figure 81—Attaching orders to a transportation order

12. Attach Final Mile or Final Mile Customer orders to the transportation order.



To be able to attach orders, you must be on the **Details II** screen for the transportation order. If you are not on the **Details II** screen, go there before starting these steps.

- a. Click **View Attach Orders**.
The system displays a list of orders for the account.
- b. Click the check boxes next to the orders you want to attach.
- c. Scroll to the bottom of the screen and then click **Attach and Detach Orders**.
The system attaches the orders to the transportation order.



You use the same basic steps to detach an order. You locate it in the list, click the check box to clear it, and then click **Attach and Detach Orders**.

- d. If you want to attach orders for a different delivery provider, do the following:



You would attach orders for multiple delivery providers if one truck is picking up product and will deliver to more than one agent partner location. For example, if a truck is picking up product from a warehouse in Chicago, delivering to an agent partner in Saint Louis, and then delivering to an agent partner in New Orleans.

- 1) Select the delivery provider number that is currently displayed in the *Delivery Provider* field.
- 2) Type a different delivery provider number.
- 3) Click **Show Orders**.
The system displays the orders for the delivery provider.
- 4) Click the check boxes next to the orders you want to attach.
- 5) Scroll to the bottom of the screen and then click **Attach and Detach Orders**.

The system attaches the orders to the transportation order.

13. At the top of the screen, click **Details II**.

Field Table: Transportation Order Entry Screen

The following fields are used on the Transportation Order Entry screen.

Table 25—Transportation Order Entry screen field definitions

Field Name	Description	Field Type	Notes
Account Number	ID number that uniquely identifies an account in Home Express.		
Warehouse	List of warehouses that the account ships from.		This list also includes the word New . If you select New , you can enter the information to add a new warehouse to the list.
Location Name	Name of the new warehouse location.	Required	Only displayed if you choose New from the Warehouse drop-down list.
Address	Address of the account warehouse.	Display only	Required when adding a new warehouse.
Address 2	Second line of the address of the account warehouse.	Display only	Required when adding a new warehouse.
City	City of the account warehouse.	Display only	Required when adding a new warehouse.
State	State of the account warehouse.	Display only	Required when adding a new warehouse.
Zip	Zip of the account warehouse.	Display only	Required when adding a new warehouse.
Country	Country of the account warehouse.	Display only	Required when adding a new warehouse. The default value is <i>United States</i> . Possible values are: • United States • Canada
Whse Contact	Name of a contact person at the account warehouse.	Display only	Required when adding a new warehouse.
Phone	Phone number of the warehouse contact person.	Display only	Required when adding a new warehouse.
Email Address	Email address of the warehouse contact person.	Display only	Optional when adding a new warehouse.
Load Date	Estimated date on which the shipment will be picked up at the warehouse.	Required	Cannot be earlier than the current date.

Field Name	Description	Field Type	Notes
Location	List of the types of locations that an order can be shipped to.	Required	Possible values: • Warehouse • Provider • Other
Warehouse	List of warehouses that the orders can be shipped to.	Required	Only displayed when you choose <i>Warehouse</i> from the Location drop-down list. This list also includes the word New . If you select New , you can enter the information to add a new warehouse to the list.
Provider #	ID number used to uniquely identify an agent partner in the Home Express System.	Display only	Only displayed when you choose <i>Provider</i> from the Location drop-down list. You cannot type the Provider #, you must use the Search button to select a provider.
Location Name	Name of the location the order is being shipped to.	Display only or Required	Only displayed when you choose <i>Other</i> from the Location drop-down list.
Address	Address of the location the order is being shipped to.	Display only or Required	If the destination is an <i>existing warehouse</i> or a <i>provider</i> , the system fills in this information automatically
Address 2	Second line of the address of the location the order is being shipped to.	Display only or Required	If the destination is an <i>existing warehouse</i> or a <i>provider</i> , the system fills in this information automatically
City	City of the location the order is being shipped to.	Display only or Required	If the destination is an <i>existing warehouse</i> or a <i>provider</i> , the system fills in this information automatically
State	State of the location the order is being shipped to.	Display only or Required	If the destination is an <i>existing warehouse</i> or a <i>provider</i> , the system fills in this information automatically
Zip	Zip code of the location the order is being shipped to.	Display only or Required	If the destination is an <i>existing warehouse</i> or a <i>provider</i> , the system fills in this information automatically
Country	Country of the location the order is being shipped to.	Display only or Required	If the destination is an <i>existing warehouse</i> or a <i>provider</i> , the system fills in this information automatically

Field Name	Description	Field Type	Notes
Whse Contact	Contact person at the location the order is being shipped to.	Display only or Required	If the destination is an <i>existing warehouse</i> or a <i>provider</i> , the system fills in this information automatically
Phone	Phone Contact person at the location the order is being shipped to.	Display only or Required	If the destination is an <i>existing warehouse</i> or a <i>provider</i> , the system fills in this information automatically
Email Address	City of the location the order is being shipped to.	Optional	
Delivery Date	Estimated date on which the shipment will be delivered to the agent partner location.	Required	
Carrier Ref. #	PRO number or other reference number used by the carrier to identify and track a shipment.	Required	The carrier provides this number.
Carrier Name	Name of the agent partner or other carrier that is transporting the order.	Display only	You cannot type the carrier information. You must use the Search button to select a carrier.
Carrier Contact	Name of a person at the carrier's location who can be contacted about the shipment.	Display only	
Carrier Phone	Phone number of the carrier contact person.	Display only	
Carrier Email	Email address of the carrier contact person.	Display only	
Weight	Total weight of the shipment.	Required	
Order Notes	Any comments or other notes related to this order.	Optional	

Field Table: Attach Orders to Transportation Order Screen

The following fields are used on the Attach Orders to Transportation Order screen.

Table 26—Attach Orders to Transportation Order screen field definitions

Field Name	Description	Field Type	Notes
Order ID	ID number used to uniquely identify an order in the Home Express system.	Display only	
Account Number	ID number assigned by the Home Express system to the account. Used to identify the account in Home Express.	Display only	
Transportation Order Number	ID number used to uniquely identify a transportation order in the Home Express system.	Display only	This number is the same as the Order ID.
Delivery Provider	ID number of the agent provider to which the product on the transportation will be delivered. The agent partner will then delivery the product to the consignees.	Optional	A transportation order might include product to be delivered for multiple agent partners. For example, a truck might pick up product at the account warehouse in Chicago and then delivery half of the load to an agent in Milwaukee and the other half to an agent in Duluth.
Order List (Includes Attach Order, Order Number, Consignee, and Account Name)	List of Final Mile and Final Mile Customer order that the agent partner will deliver for this account. Used to select which orders are associated with this transportation order.	Optional/ Display only	The list includes the order number, the consignee name and the account name. Each entry in the list is preceded by a check box. A check mark indicates that the product for the selected order is part of the transportation shipment.

Conclusion

The order entry screens allow the agent partner and the Fort Wayne coordinator to enter orders. Features built into the system, such as the automatic entry of some information, speed up the order entry process. For the automatic entry of data to be effective, the account profile must be up to date and accurate.

Creating Local Accounts

Description

One benefit of the Home Express system is that agent partners can use it to manage deliveries for local accounts. A local account is one that is located within an agent partner's service area and does business with only that agent partner. If an agent partner chooses to use the system, the agent partner is responsible for entering the account profile information before entering local deliveries.

After completing a local delivery, the agent partner is responsible for billing the account. Home Express does not generate invoices for local accounts. However, information about the activities that are performed for a local order is recorded in the Home Express system. The system can be used as a resource for creating invoices.

In contrast, a national account is one that is located in multiple areas of the country and has a single contract with SIRVA. A national account might do business with many of the agent partners in the Home Express network. The Fort Wayne coordinators maintain account profile information for national accounts. The Home Express team, in Fort Wayne, processes billing information for national accounts.

1. Click Create Account.

SCAC Code	Order #	Consignee	Address/City/State	Zip	Order Type	Order Status	Freight Available	Actual Set Off	Est. Del. Date	Req. Del. Time
ACHF	1390	Transportation	985 Apple Tree Drive Superior WI	54880	Transportation	Open	3/19/2003		3/19/2003	
ACHF	1389	Transportation	125 Peppermint Lane Duluth MN	55811	Transportation	Set Off	3/19/2003		3/19/2003	
ACHF	1388	Carol Ann Cowden	854 pine avenue duluth MN	55810	Returns	Open	3/18/2003			
ACHF	1387	Carol Ann Cowden	854 pine avenue duluth MN	55810	Returns	Open	3/18/2003			
ACHF	1386	Transportation	125 Peppermint Lane Duluth MN	55811	Transportation	Set Off	3/19/2003		3/19/2003	
CECM	1385	Charlie	123 joliet IL	60435	Final Mile Customer Whse	Set Off	3/18/2003	3/18/2003	3/23/2003	8:00
ACHF	1384	Charlie	123 joliet IL	60435	Final Mile	Set Off	3/18/2003		3/23/2003	9:30
ACHF	1383	Charlie	123 duluth MN	55812	Final Mile	Set Off	3/18/2003		3/23/2003	13:00
ACHF	1382	Transportation	125 Peppermint Lane Duluth MN	55811	Transportation	Set Off	3/19/2003		3/19/2003	
ACHF	1381	Transportation	125 Peppermint Lane Duluth MN	55811	Transportation	Set Off	3/19/2003		3/19/2003	

Figure 82—Operations Home screen

2. Fill in the account information.

3. Click Add New Account.

New Account Profile

Enter Account ID:

SCAC ID:

Account Name:

Country:

Address:

City: State: Zip:

Business Type:

Contact Name:

Phone:

Fax:

Add New Account

Figure 83—Creating a local account

Instructions: Creating a Local Account

Use the steps below to create a local account.

1. In the navigation bar, on the left side of the screen, click **Create Account**.
The system displays the **New Account Profile** screen.
2. Type the account information.
3. Click **Add New Account**.
The system displays the **Home Express Account Profile** screen.

Field Table: New Account Profile Screen

The following fields are used on the New Account Profile screen.

Table 27—New Account Profile screen field definitions

Field Name	Description	Field Type	Notes
Master Account ID	Used to group several accounts together for billing purposes. For example, if Acme Home Furnishings has three locations each could be treated as a separate account. If they all have the same master account ID, the billing would be consolidated and sent to the same location.	Optional	
SCAC ID	SCAC ID for the account that is shipping products to the consignee.	Display only	<i>SCAC</i> is an abbreviation for Standard Carrier Alpha Code. A SCAC ID is a four-character code used to identify the account.
Account Name	Name of the local account.	Required	
Country	Country in which the local account is located.	Optional	The default value is <i>United States</i> . Possible values are: • United States • Canada
Address	First line of the address for the local account.	Required	
Address, line 2	Second line of the address for the local account.	Optional	This field is not labeled on the screen. It is located below the <i>Address</i> field.
City	City in which the local account is located.	Required	
State	State in which the account is located.	Optional	
Zip	Zip code or postal code of the account.	Required	
Business Type	Indicates whether this is a local or national account.	Display Only	Defaults to <i>Local</i> and cannot be changed. The only type of account that you can create is a local account. The coordinators create national accounts.

Field Name	Description	Field Type	Notes
Contact Name	Name of person at the local account who can be contacted about a shipment.	Optional	
Phone	Phone number for the local account.	Required	
Fax	Fax number for the local account.	Optional	

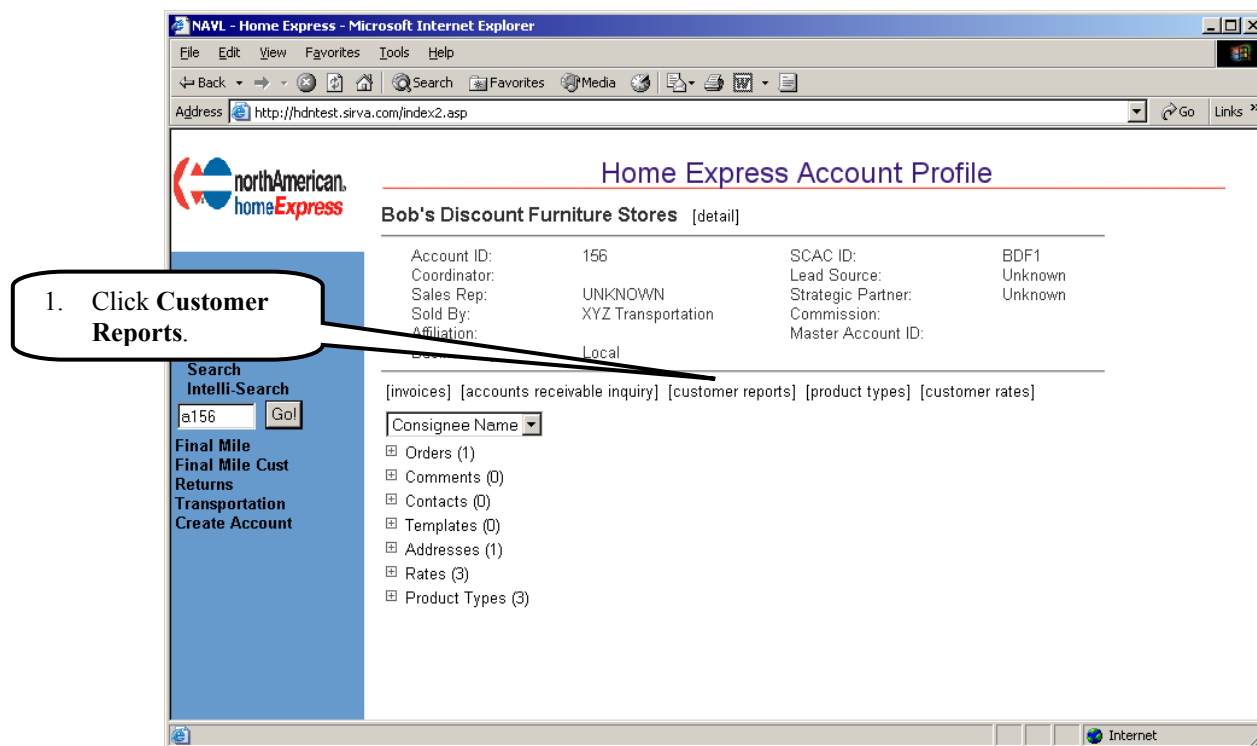


Figure 84—Home Express Account Profile screen

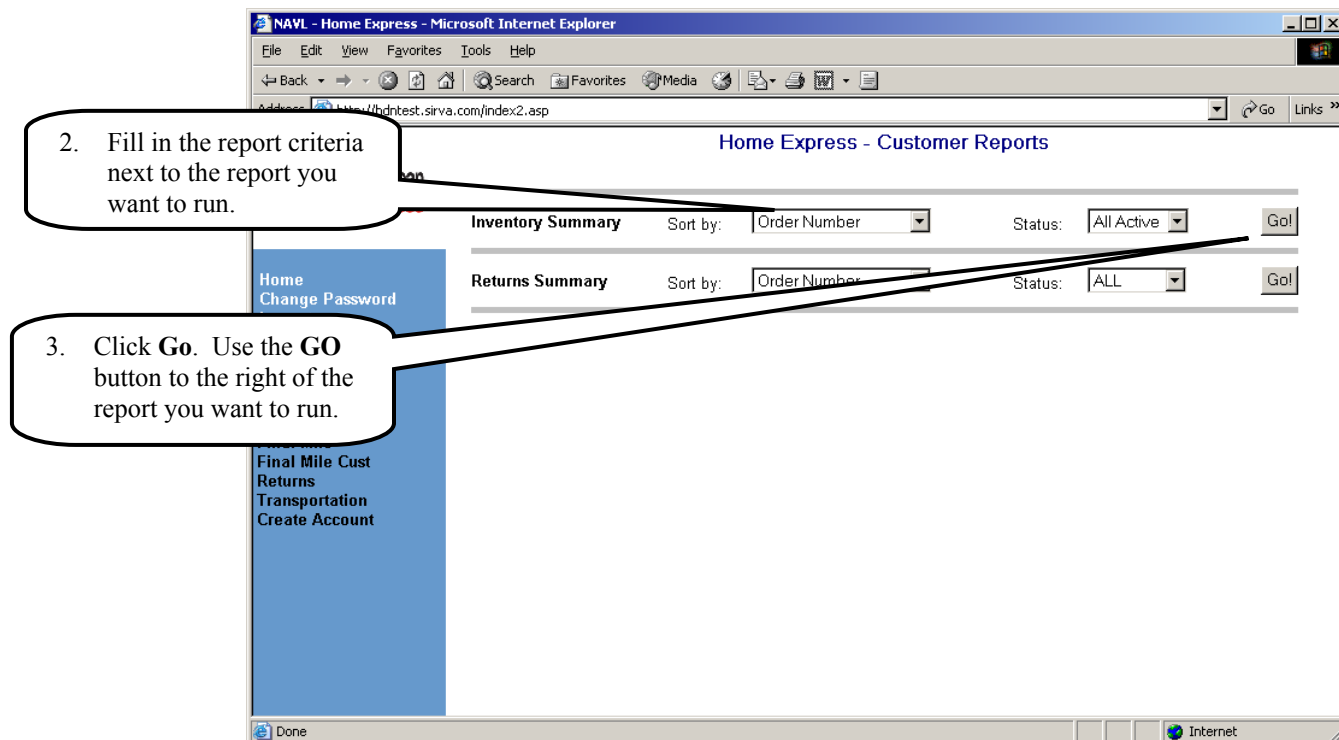


Figure 85—Customer Reports screen

Instructions: Running Customer Reports

Reports allow you to retrieve and summarize information from the Home Express system.



At this writing, only two reports have not been defined. If additional reports are defined in the future, they will be listed on this screen. The steps below are used with all reports.



These steps assume that you are on the **Home Express Account Profile** screen. If you are not on that screen, search for the account and go to the profile screen before beginning these steps.

1. Click **Customer Reports**.

The system displays the **Customer Reports** screen. The available reports are listed on the screen and are separated by horizontal gray lines.

2. Type or select the report criteria.



Different reports require different criteria. To the right of each report name, the system displays fields for the criteria. Some of the fields are drop-down lists; some are text boxes that you type in.

3. Click **Go**.

The system displays the report results in the **Crystal Report Viewer**.



See “Appendix A—Using the Crystal Report Viewer” for information about working with the report results.

1. Click Product Types.

Figure 86—Home Express Account Profile screen

2. Click an existing product Or Click Add New Product Type.

Product #	Type Code	Product Description	Weight (lbs)	Product Value	Total Cube
6245	D	Refrigerator	50	799	54
3652	C	Washer	36	299	36
6521	C	Dryer	34	499	36
1254	A	Microwave	14	89	3.5
6524	B	DVD Player	8	149	0.75

Figure 87—Product Types screen

Instructions: Adding or Editing Product Types

The product type list is used when you create an order. One step in creating the order is to select the products that will be delivered to the consignee. This procedure creates the list of products.



These steps assume that you are on the **Home Express Account Profile** screen. If you are not on that screen, search for the account and go to the profile screen before beginning these steps.

1. Click **Product Types**.

The system displays the **Product Types** screen. If any products were entered previously, they are displayed in the table.

2. To edit a product type, click any piece of information for the product, such as the product number or product description.

Or

To add a new product type, click **Add New Product Type**.

The system displays the **Add/View Product Types** screen.

Continue with the steps on the next page.

3. Fill in the product information.

4. Click **Add New Product Type** (If you are editing a product type, the button is labeled **Save Changes**.)

Home Express - Add/View Product Types

Customer Name: Appliance Warehouse Customer ID: 257 SCAC ID: APPW Business Type: Local

Product Number: * Product Description: *

Type Code: Select * Product Value: \$0.00 *

Weight: 0 * Length (inches): 0.00 * Height (inches): 0.00 *

Is Accessorial: ☒ Accessorial: Select *

Units: 1

Product Comments:

Add New Product Type Back

Search for Account Search for Partner

Figure 88—Add/View Product Types screen

3. Type the product information.

- a. Type the product number in the *Product Number* field.
- b. Type the product description in the *Product Description* field.



The description is displayed on the order entry screens. You can include any information in the description, including the SKU number, the part number, etc..

- c. Select a type code from the **Type Code** drop-down list.
- d. Type the product replacement cost in the *Product Value* field.
- e. Type the product weight in the *Weight* field.
- f. Type the length of the product in inches in the *Length* field.
- g. Type the height of the product in inches in the *Height* field.
- h. Type the width of the product in inches in the *Width* field.
- i. Leave the **Permanent Accessories** check box blank.



Although you can use Home Express to track orders for local accounts, you cannot use it to process the billing for local accounts. Since accessories apply to billing, do not use this option.

- j. Type any comments or notes about the product in the *Product Comments* field.

4. If you are editing an existing product type, click **Save Changes**.

Or

If you adding a new product type, click **Add New Product Type**.

The system displays the **Add/View Product Types** screen.

Field Table: Add/View Product Types Screen

The following fields are used on the Add/View Product Types screen.

Table 28—Add/View Product Type screen field definitions

Field Name	Description	Field Type	Notes
Product Number	Number used to uniquely identify the product. This number is assigned by the account.	Required	
Product Description	Text that describes the product.	Required	The description for each product must be unique. The description can include the part number, SKU # or other needed information. The description is displayed on the Final Mile and Final Mile Customer order entry screens and is used to select products to be delivered to the consignee.
Type Code	Indicates the relative cost or difficulty of delivering the product.	Required	In general, the more difficult the delivery, the higher the charge. The type code gives you four <i>tiers</i> for pricing deliveries. Possible values: • A—Least difficult • B • C • D—Most difficult Note: When working with local accounts, the billing is not handled through the Home Express system. However, you still have to create the Product Types list so that it is available when creating orders.
Product Value	Replacement value of the product.	Required	
Weight	Total weight of the product	Required	Measured in pounds.
Length (inches)	Length of the product, at the longest point.	Required	Measured in inches.
Height (inches)	Height of the product, at the tallest point.	Required	Measured in inches.
Width (inches)	Width of the product, at the widest point.	Required	Measured in inches.

Field Name	Description	Field Type	Notes
Total Cube	Size of the product in cubic feet.	Display only	Calculated field. The system multiplies the length by the width by the height and then divides by twelve. The length, width, and height are entered in inches. The system divides by twelve in order to convert the cubes to cubic feet. This value is calculated when the product type record is saved.
Permanent Accessorial	Check box used to indicate that an accessorial always applies to the product.	Not Used	When you click this check box, the system adds the Accessorial drop-down list and the Units field.
Accessorial	List of accessories that are defined for this account.	Not Used	
Units	Multiplier used to indicate the number of times the rate should be applied to this order.	Not Used	Only used when you select a permanent accessorial.
Product Comments	Any text or notes that apply to this product type.	Optional	Free-form text; it doesn't have to be in any specific format.

Instructions: Reviewing Orders

The procedure for reviewing orders from the **Account Profile** screen is the same as the procedure for reviewing orders from the **Agent Profile** screen. To avoid repeating information, this is documented in the **My Agents** section of the manual.

See “Instructions: Reviewing the Partner Profile” on page 95 for information about this option.

Instructions: Adding or Reviewing Comments

The procedure for adding or reviewing comments for a local account is the same as the procedure for adding or reviewing comments for an order. To avoid repeating information, this option is documented in the section that describes reviewing information about orders.

See “Instructions: Adding or Reviewing Comments” on page 51 for information about this option.

Instructions: Adding or Editing Contacts

The procedure for adding or editing contacts from the **Account Profile** screen is the same as adding or editing contacts from the **Agent Profile** screen. To avoid repeating information, this is documented in the **My Agents** section of the manual.

See “Instructions: Adding or Editing Contacts” on page 115 for information about this option.

Instructions: Templates

A template is used to define a standard method for billing an account, for example you use a template to define the billing frequency. Since you cannot use Home Express to bill local accounts, do not use this option.

Instructions: Adding or Editing Addresses

The procedure for adding or editing an address from the **Account Profile** screen is the same as the procedure for adding or editing addresses from the **Agent Profile** screen. To avoid repeating information, this option is documented in the section that describes the **My Agents** option.

See “Instructions: Adding or Editing Addresses” on page 119 for information about this option.

Instructions: Accessorial Rates

Accessorial rates define how much the account is charged for services in addition to the delivery service. For example, setting up a computer after delivering it to the consignee would be charged as an accessorial. Since you cannot use Home Express to bill local accounts, do not use this option.

Conclusion

Any agent partner can set up local accounts. During the order entry process, some data is filled in automatically. For the automatic entry to be effective, the account profile must be up to date and accurate. When an order is entered for a local account, it appears on the Operations Home screen and is treated just like an order for a national account. This makes it easier for the planner to schedule shipments.

Performing Shipment planning Tasks

Description

A planner at the agent partner location performs shipment planning tasks before deliveries are made. The tasks include updating the status of orders; recording the actual set off date for products arriving at the agent partner location; assigning deliveries to trucks and to truck dates; sequencing deliveries; and printing paper work for the drivers. The planner also assigns scheduled dates and scheduled times to each order.

After the deliveries are made, the planner records the actual date and time of the delivery and the proof of delivery (POD) information.

All of these tasks are performed using two screens: the Operations Home screen and the Operations Planning screen. Both screens include options to make the planning tasks easier. Links allow you to drill down to more detailed information. Information on the screen can be sorted and drop-down lists allow you to limit the amount of information on the screen at one time.

The person performing the shipment planning tasks might be the same person who performs the pre-call tasks. Some of the screens and steps used for the shipment planning process are the same as the steps for the pre-call process.



Some agent partners perform the pre-call tasks before the shipment planning tasks; others perform the shipment planning tasks first. Either method is allowed.

2a2. Select a new status from the Order Status drop-down list.

2a3. If the new status is **Set Off**, type the actual set off date.

Order #	Consignee	Address/City/State	Zip	Order Type	Order Status	Freight Available	Actual Set Off	Est. Del. Date	Reg. Del. Time	Weight	Map C-rd	Truck	Truck Date
ACHF 3206	Bob Jones	123 Pine Avenue Duluth MN	55816	Final Mile	Open	11/14/2003		11/17/2003	Anytime	32			
JDCS 3205	Joe's Discount Compu	652 Pine Avenue Duluth MN	55810	Transportation	Open	11/13/2003		11/13/2003		54			
ACHF 3204	Acme Home Furnishing	8542 Junipur Road Duluth MN	55816	Transportation	Open	11/11/2003		11/11/2003		200			
ACHF 3203	Acme Home Furnishing	123 Oak Street Duluth MN	55810	Returns	Open	11/11/2003				158			
ACHF 3202	Acme Home Furnishing	123 Oak Street Duluth MN	55810	Local	Open	11/12/2003		11/12/2003	Afternoon	345			
3092	Susan Tarbox	987 Maple Lane Duluth MN	55811	Returns	Open	8/28/2003				28			
3084	Susan Tarbox	652 Elm Street Duluth MN	55810	Local	Open	8/27/2003		8/27/2003		125	a1	1010	8/27/2003
JDCS 3082	Susan Tarbox	987 Maple Lane Duluth MN	55811	Final Mile	Open	8/26/2003		8/31/2003	anytime	121	c3	1010	8/27/2003
ACHF 3081	Susan Tarbox	854 Pine Avenue Duluth MN	55810	Final Mile	Open	8/27/2003		9/1/2003	morning	118	b2	1010	8/27/2003
ACHF 3080	Susan Tarbox	123 Oak Street Duluth MN	55812	Final Mile	Open	8/26/2003		8/31/2003	13:00	140	d5	1010	8/27/2003
JDCS 3079	Mary Jones	123 Maple Drive Duluth MN	55819	Returns	Open	8/26/2003				28			
JDCS 3078	Mary Jones	123 Maple Drive Duluth MN	55819	Final Mile	Set Off	8/27/2003	8/27/2003	9/1/2003	Morning	54			

Figure 89—Changing the order status

2b3. Select a new status from the Status drop-down list.

Order ID: 1390

Details II

Customer Name: Acme Home Furnishings Customer ID: 151 SCAC ID: ACHF

Order Type: Transportation

From Location: North Warehouse

From Address: 1985 Apple Tree Drive

From City: Superior

From State: Wisconsin

From Zip: 54880

From Country: United States

From Contact: Mary Smith

From Phone: (555) 123-5544

To Location:

To Address: 123 Oak Street

To City: Duluth

To State: Minnesota

To Zip: 55812

To Country: United States

Contact Name: John Smith

Phone: (555) 123-4569

Carrier Ref #: 848

Load Date: 3/1

Delivery Date: 3/1

Weight: 100

Status: Open

Actual Setoff:

Order Notes:

Figure 90—Changing status on the Details II screen

Instructions: Updating the Order Status

You can update the order status from the **Operations Home** screen or from the **Details II** screen. If the current or the new status is other than Open, In Transit, or Set off, you must use the **Details II** screen to make the change. Also, transportation orders must always be updated on the **Details II** screen.

1. In the navigation bar, on the left side of the screen, click **Home**.

The system displays the **Operations Home** screen.

2. Do one of the following:

- a. If the order status is **Open**, **In transit** or **Set Off**:

- 1) Locate the order you want to update.

- 2) From the **Order Status** drop-down list select a new status.

- 3) If the status you selected is **Set Off**, click in the *Actual Set Off* field and then type the actual set off date.



If you selected **Set Off** by mistake, the system will not allow you to change the status to **Open** or **In transit** until you enter a set off date. Type a date in the field and then change the status to the correct option.

- 4) Update other orders as needed.

- 5) Use the navigation bar to move to another screen.



Changes to the status on the **Home** screen are not saved until you exit the screen. Select another screen, such as **My Agents**, so that the changes are saved.

Or

- b. If the order status is **Delivered**, **Billed** or **Complete**, or if the order is a transportation order:

- 1) Locate the order you want to update and then click the order number.

The system displays the **Details II** screen.

- 2) Select a new status from the **Status** drop-down list.



If you change the status to Set off, you must also enter the Actual Set off date.

- 3) Scroll to the bottom of the screen and then click **Save**.

The system saves the changes.

1. Click **Home**.

2. Select an order status.

3. Sort data using a column heading..

Order Code	Order #	Consignee	Address/City/State	Zip	Order Type	Order Status	Freight Available	Actual Set Off	Est. Del. Date	Reg. Del. Time	Wei
ACHF	1329	Harold Wilson	432 Beach Court address 2 Duluth MI	55812	Returns	Set Off	3/10/2003	03/07/03			15
ACHF	1328	Harold Wilson	432 Beach Court address 2 Duluth MI	55812	Returns	Set Off	3/10/2003	03/07/03			15
ACHF	1318	Mary Smith	123 Oak street Duluth MN	55812	Returns	Set Off	3/5/2002	03/08/03			
ACHF	1315	Amy Hill	7854 Palm Court 2B Duluth MN	55811	Final Mile	Open	3/3/2003		3/9/2003	10:00AM	12
CECM	1313	Mary Jones	854 Washington Blvd. 2B Duluth MN	55812	Final Mile Customer Whse	Open	3/3/2003		3/3/2003	8:00AM	18
JOEE	1312	Larry Putnam	123 Oak Street Duluth MN	55813	Local	Open	3/3/2003		3/3/2003	10:00AM	15
ACHF	1311	Henry Paulson	8541 Oak Street 2B Duluth MN	55810	Final Mile Customer Whse	Open	3/3/2003		3/9/2003	8:00AM	38
ACHF	1310	Mary Jones	8541 Villa Park Lane Duluth MN	55812	Returns	Open	3/3/2003		3/3/2003	10:00AM	
ACHF	1308	Mary Jones	8541 Villa Park Lane Duluth MN	55812	Returns	Open	3/3/2003		3/3/2003	8:45AM	
ACHF	1306	Harold	432 Beach Court	55812	Final Mile	Open	3/4/2003		3/9/2003	10:30AM	17

Figure 91—Operations Home screen

5. Enter shipment information.

6. Click Shipment Planning.

Order	Order Status	Freight	Actual Set Off	Est. Del. Date	Reg. Del. Time	Weight	Map C-ord	Truck	Truck Date
Court Duluth	55812 Returns	Set Off	3/10/2003	03/07/03		150	B7	1234	03/11/03
Court Duluth	55812 Returns	Set Off	3/10/2003	03/07/03		150	A8	1234	03/11/03
reet	55812 Returns	Set Off	3/5/2002	03/08/03			D9	1234	03/11/03
Court MN	55811 Final Mile	Open	3/3/2003		3/9/2003 10:00AM	12			
ngton Duluth MN	55812 Final Mile Customer Whse	Open	3/3/2003		3/3/2003 8:00AM	18			
reet	55813 Local	Open	3/3/2003		3/3/2003 10:00AM	150			
Street 2B	55810 Final Mile Customer Whse	Open	3/3/2003		3/9/2003 8:00AM	38			
Park h MN	55812 Returns	Open	3/3/2003		3/3/2003 10:00AM				
Park h MN	55812 Returns	Open	3/3/2003		3/3/2003 8:45AM				
Court	55812 Final Mile	Open	3/4/2003		3/9/2003 10:30AM	174	b7	1234	3/4/2003

Figure 92—Adding map coordinates and truck information

Instructions: Planning Shipments

Use the following instructions to perform operations planning tasks.

1. In the navigation bar, on the left side of the screen, click **Home**.
The system displays the **Operations Home** screen.
2. Use the **Order Status** drop-down list to select the orders you want to work with.
The default value is **All Active**.
3. If you want to sort the information, click a column heading.
The system sorts the data.



If you click a column heading once, the system sorts the data in ascending order (A-Z, 0-9). If you click the same column heading again, the system sorts the data in descending order (Z-A, 9-0).

4. If you want more information about an order, do the following:
 - a. Click either the order number or the consignee name:
 - If you click an order number, the system displays the **Details II** screen.
 - If you click a consignee name, the system displays the **Call Sheet**.
 - Or
 - b. When you are done reviewing the information, click **Home**.
The system displays the **Operations Home** screen.
5. Enter shipment information:
 - a. Locate an order in the list. On the right side of the screen are three fields for data entry. You might have to scroll to the right to be able to see the fields.
 - b. Enter map coordinates for this order in the *Map C-rd* field.
 - c. Enter a truck number for this order in the *Truck* field.
 - d. Enter a truck date for this order in the *Truck Date* field.



Orders with the same truck number and truck date are shipped together.

- e. Repeat entering shipment information for other orders.
6. Click **Shipment planning**.
The system displays the **Operations Planning** screen.

7a. Select a truck date.

7b. Select a truck number.

10. Type sequence numbers.

11. Enter scheduled dates and times.

12. Click **Update Load**.

Date	Truck #	Seq	Map	Order#	Consignee	Address/City/State/Zip	Weight	Actual Setoff Date	Est. Del. Date	Reg. Del. Time	Scheduled Date	Scheduled Time	Op's Entry	CA	i
11/13/2003	1254	d5	3205	Joe's Discount Compu	652 Pine Avenue Duluth 54 MN,55810			11/13/2003			11/13/2003				
11/13/2003	1254	d7	3204	Acme Home Furnishing	8542 Junipur Road Duluth MN,55816	200		11/11/2003			11/13/2003				

Update Load Print Delivery Receipt Print Manifest

Search Search for Partner

Figure 93—Operations Planning screen

7. To make the planning tasks easier, do the following:

- a. Select a truck date from the **Truck Date** drop-down list.
- b. Select a truck number from the **Truck Number** drop-down list.



You must select a truck date before you can select a truck number.

- c. Select a status from the **Order Status** drop-down list.

8. If you want to sort the information, click a column heading.



If you click a column heading once, the system sorts the data in ascending order (A-Z, 0-9). If you click the same column heading again, the system sorts the data in descending order (Z-A, 9-0).

9. If you want more information about an order do the following:

- a. Click either the order number or the consignee name.
 - If you click an order number, the system displays the **Details II** screen.
 - If you click a consignee name, the system displays the **Call Sheet**.
- b. On the Call Sheet screen, click **Save & Return to Operations** to return to the **Operations Planning** screen.

10. Type sequence numbers for each order in the *Seq* field.



If more than one order is going to the same stop, use the same sequence number. All orders with the same sequence number are delivered to the same stop.

11. Enter scheduled dates and times:

- a. Type the date in the *Scheduled Date* field.
- b. Enter the scheduled time in the *Scheduled Time* fields. The scheduled time is a time range. Select a beginning time from the first drop-down list. Select an ending time from the second drop-down list.

12. To save changes, click **Update Load**.



Click **Update Load** periodically to save your changes. You do not have to wait until you have finished all of the data entry to save your changes.

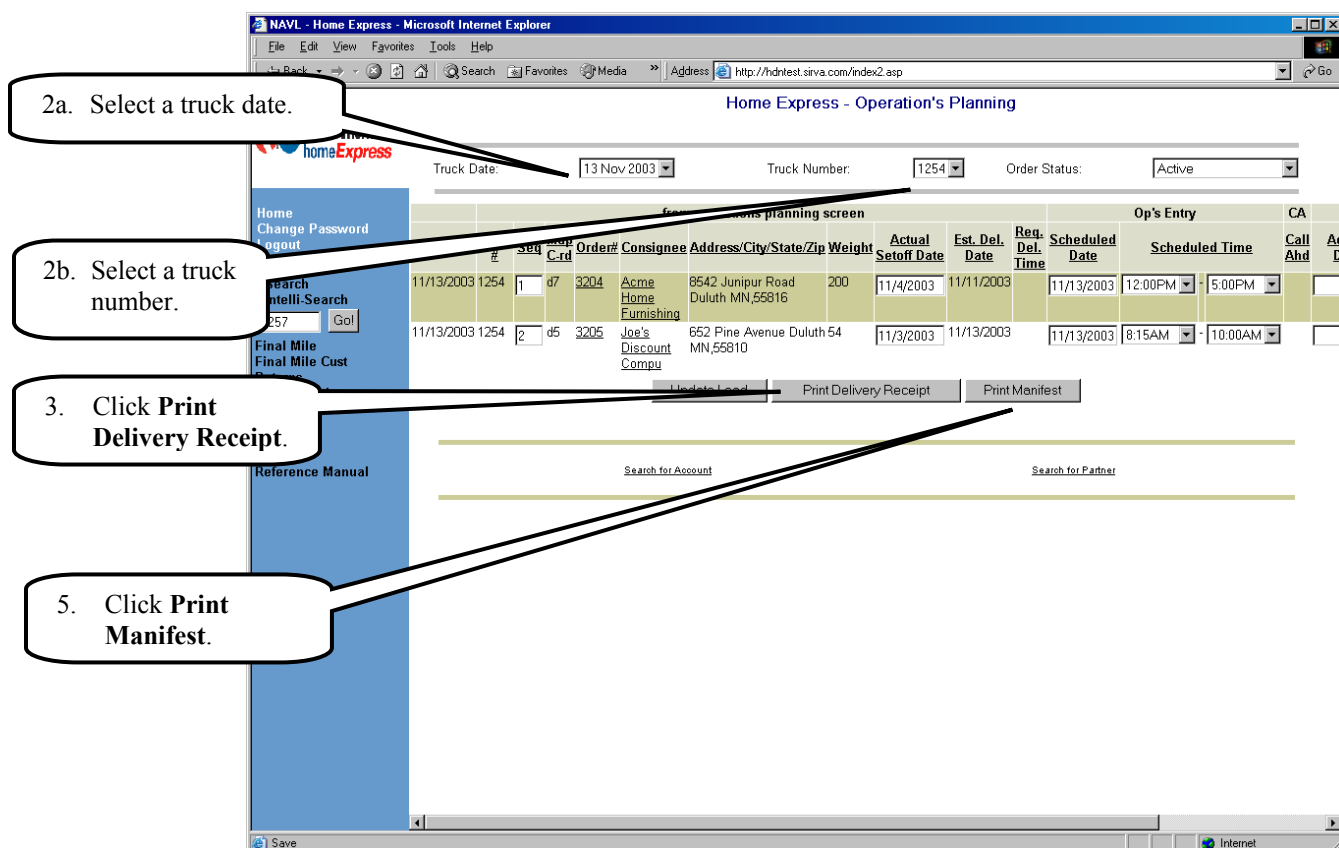


Figure 94—Operations Planning screen

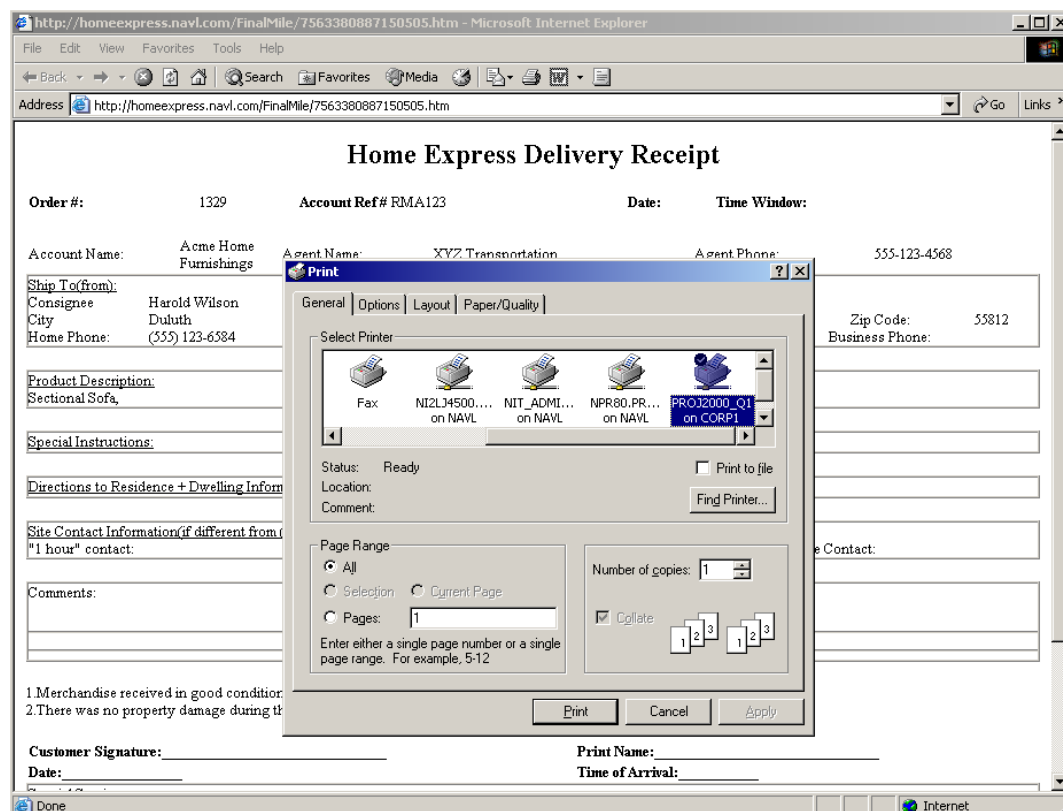


Figure 95—Printing a delivery receipt

Instructions: Printing Driver Paperwork



These instructions assume that you are on the Home Express Home screen. If you are not on the home screen, please click Home.

1. Click **Shipment planning**.
2. To locate the truck for which you want to print paperwork, do the following:
 - a. Select a truck date from the **Truck Date** drop-down list.
 - b. Select a truck number from the **Truck Number** drop-down list.



You must select a truck date before you can select a truck number.

- c. Select a status from the **Order Status** drop-down list.
3. Click **Print Delivery Receipts**.

The system displays one **Print** dialog box for each delivery receipt. For example if you have 3 orders on a truck and choose to print receipts, you will see the **Print** dialog box 3 times.



Printing delivery receipts from the **Operations Planning** screen allows you to print the receipts for all of the orders on a truck at one time.



If you need a delivery receipt for a single order, click on the consignee name to go to the **Call Sheet**. At the bottom of the call sheet, click **Print Delivery Receipt**.

4. Select a printer and then click **Print** for each delivery receipt.

The system prints the receipts and returns to the **Shipment planning** screen.
5. Click **Print Manifest**.

The system displays the **Print** dialog box.
6. Select a printer and then click **Print**.

The system prints the manifest and returns to the **Shipment planning** screen.

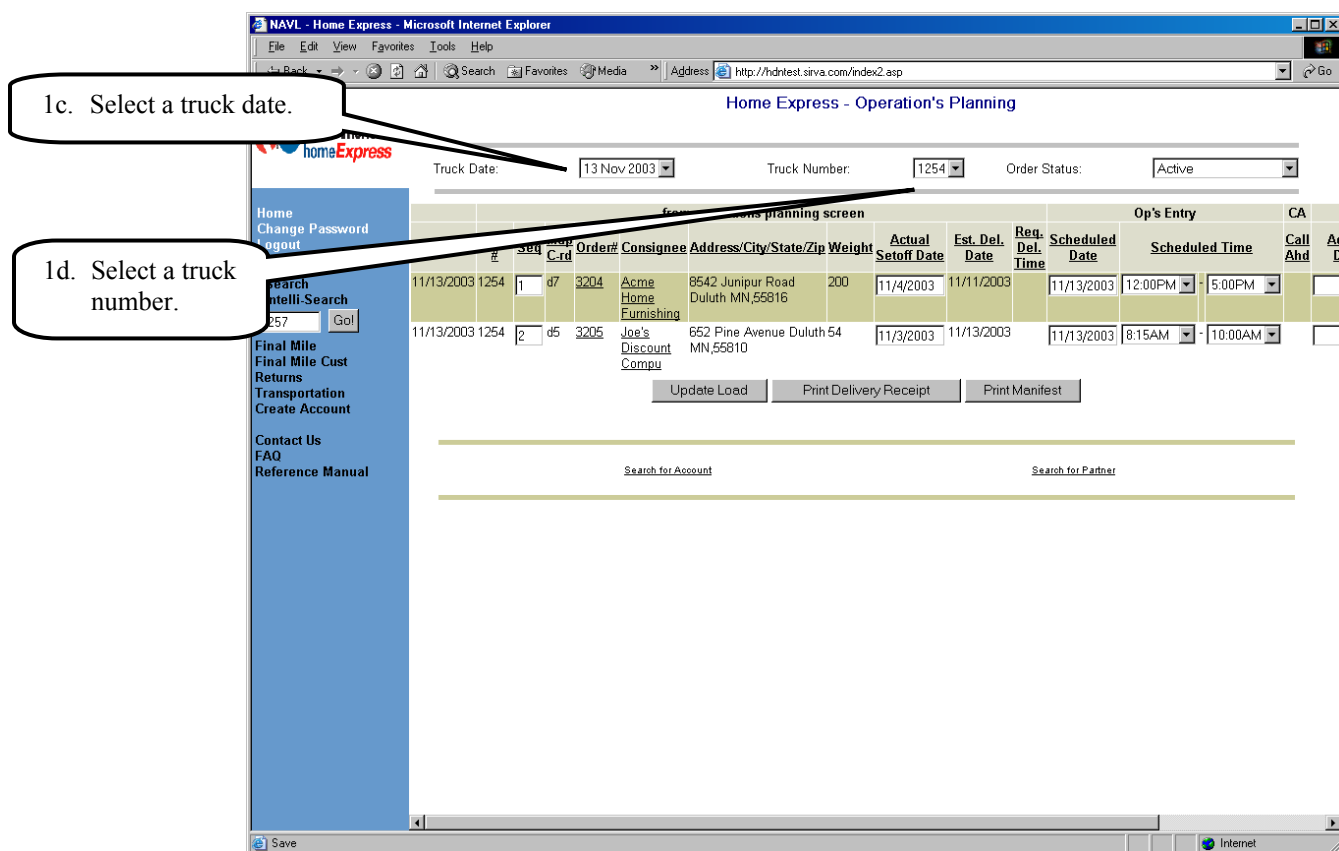


Figure 96—Operations Planning screen

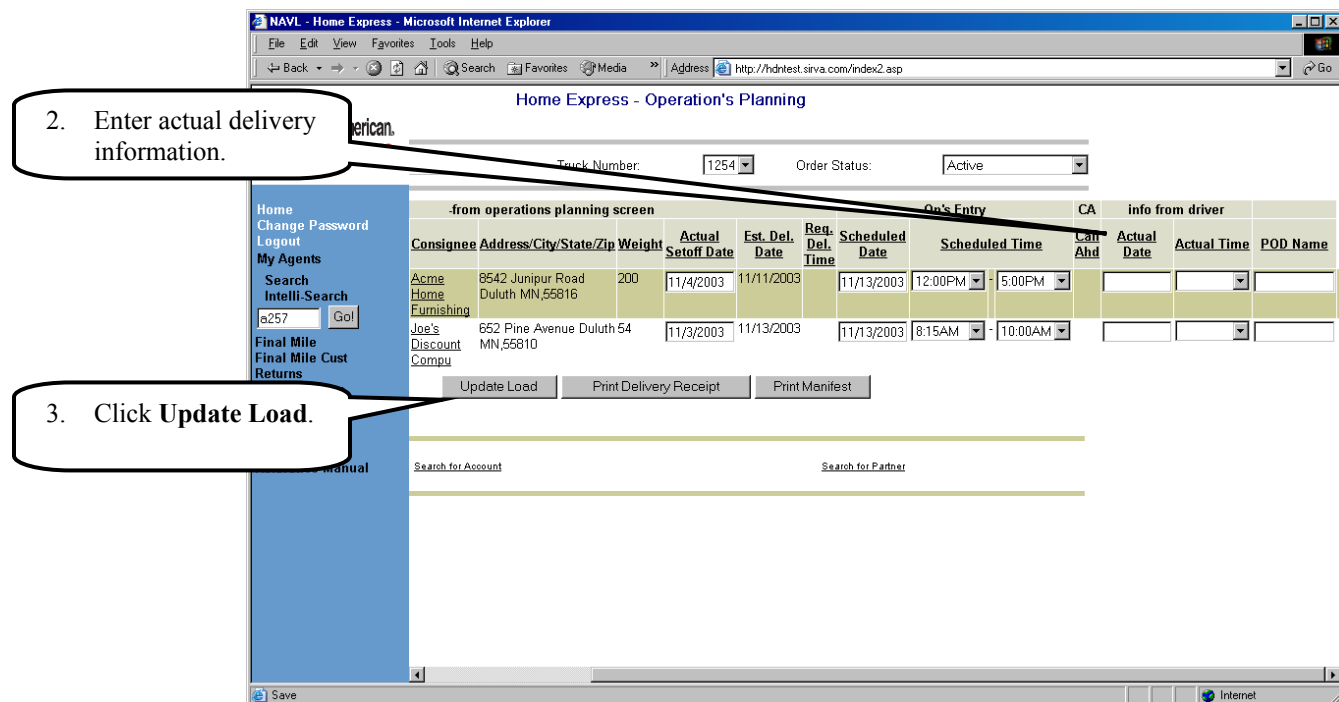


Figure 97—Entering proof of delivery information

Instructions: Entering Proof of Delivery Information

After the driver has delivered the orders and returned to the agent partner location, he or she turns in the signed delivery receipts and the completed trip manifest.

The planner is then responsible for entering the information into the Home Express system using the steps below.



Before entering the proof-of-delivery information, check for any accessorials that were performed for the order, but which are not recorded yet. If there are accessorials that are not added yet, contact the coordinator. The coordinator can add the accessorials.

1. Locate the order on the **Operations Planning** screen.

- a. In the navigation bar, on the left side of the screen, click **Home**.
The system displays the **Operations Home** screen.

- b. Click Shipment planning.
The system displays the **Operations Planning** screen.

- c. Select a truck date from the **Truck Date** drop-down list.

- d. Select a truck number from the **Truck Number** drop-down list.



You must select a truck date before you can select a truck number.

- e. Select a status from the **Order Status** drop-down list.

- f. If you want to sort the information, click a column heading.



If you click a column heading once, the system sorts the data in ascending order (A-Z, 0-9). If you click the same column heading again, the system sorts the data in descending order (Z-A, 9-0).

2. Enter the information from the delivery receipts and the manifest.

- a. Type the actual delivery date in the *Actual Date* field.
- b. Select the actual delivery time from the *Actual Time* drop-down list.
- c. Type the name of the person who signed for the delivery in the **POD** field.

3. Click **Update Load** to save the changes.

Field Table: Operations Home Screen

The following fields are used on the Operations Home screen.

Table 29—Operations Home screen field definitions

Field Name	Description	Field Type	Notes
Order Status drop-down list	Drop-down list used to select which orders the system displays on the screen.	Optional	Default is All Active Choices are: • All Active • Open • Set Off • In transit • Delivered • Billed • Complete • Hold
SCAC Code	SCAC ID for the account that is shipping products to the consignee.	Display only	SCAC is an abbreviation for Standard Carrier Alpha Code. A SCAC ID is a four-character code used to identify the account.
Order #	Sequential number assigned to the order by the Home Express system for identification purposes.	Display only	
Consignee	Name of person or company the account is shipping product to.	Display only	
Address/City/State	The address, city and state of the consignee.	Display only	
Zip	The zip code of the consignee.	Display only	
Order Type	Lists the type of the order.	Display only	Possible values: • Final Mile • Final Mile Customer Whse • Returns • Transportation

Field Name	Description	Field Type	Notes
Order Status	Description indicating where the order is in the order process.	Optional	As the order goes through the different stages of the order process, the status is updated manually by the planner or automatically by the system. If the status of an order is either in transit, set off, or open, the planner can change the status from the Operations Home screen. Otherwise, the status is changed on the Details II screen. Possible values: • Open • Set Off • In transit
Freight Available	Estimated date on which the freight will arrive at the provider agent location.	Display only	
Actual Set Off	Actual date on which the product for the order arrived at the agent partner location.	Required whenever the status is changed to Set Off	The actual set off date can be compared to the freight available date to determine the accuracy of the estimated set off dates.
Est. Del. Date	Estimated date on which the freight will be delivered to the consignee.	Display only	
Req. Del. Time	Time of day when the consignee would prefer the delivery to take place.	Display only	Req. is an abbreviation for <i>requested</i> , not required.
Weight	Total weight of all of the products on the order.	Display only	
Map C-rd	Map coordinates for this delivery.	Optional	Free-form text; it does not have to be in any particular format.
Truck	Designation of the truck that will deliver this order.	Required	Maximum of six letters or numbers. Free-form text; it does not have to be in any particular format.
Truck Date	Date on which the delivery truck will leave the agent partner location.	Required	Use the following format: mm/dd/yy.

Field Table: Operations Planning Screen

The following fields are used on the Operations Planning screen.

Table 30—Operations Planning screen field definitions

Field Name	Description	Field Type	Notes
Truck Date drop-down list	Date on which the delivery truck will leave the agent partner location.	Optional	List used to limit the amount of data on the screen. Limiting the data makes it easier to work with the information.
Truck Number drop-down list	Designation of the truck that will deliver this order.		Drop-down list used to limit the amount of data on the screen. You must select a Truck Date before selecting a Truck Number.
Order Status drop-down list	Used to select which orders you want to work with on the Operations Planning screen.		Drop-down list used to limit the amount of data on the screen. Possible values: • Active • Delivered
Date	Date on which the delivery truck will leave the agent partner location.	Display Only	
Truck #	Designation of the truck that will deliver this order.	Display Only	
Seq	Number indicating at which stop the order will be off-loaded.	Required	
Map-Crd	Map coordinates for this delivery.	Optional	
Order #	Sequential number assigned to the order by the system for identification purposes.	Display only	
Consignee	Name of person or company the account is shipping product to.	Display only	
Address/City/State/Zip	The address, city, state and zip code of the consignee.	Display only	
Weight	Total weight of all of the products on the order.	Display only	
Actual Set off Date	Date on which the product arrived at the agent partner location.	Optional	

Field Name	Description	Field Type	Notes
Est. Del. Date	Estimated delivery date.	Display only	This date was calculated when the order was originally created.
Req. Del. Time	Requested (not required) delivery time. Time that the consignee requested for delivery.	Display only	Entered when the order was originally created.
Scheduled Date	Date that the agent partner and the consignee have agreed on as the delivery date.	Optional	The default is the truck date, which is entered on the Operations Home screen. Can also be entered on the Details II screen.
Scheduled Time	Time range during which the delivery will take place.	Optional	Can also be entered on the Details II screen.
Call Ahead	Code letter indicating the status of the call ahead.	Display only	Entered on the Call Sheet. Possible values: • C—Called, spoke to someone • N—Called, no answer • V—Called, left a voice mail • Blank—Not yet called
Actual Date	Date on which the delivery actually took place.	Optional	This information comes from the completed manifest turned in by the driver.
Actual Time	Time at which the delivery actually took place.	Optional	This information comes from the completed manifest turned in by the driver.
POD	Name of the person who signed for the delivery.	Optional	This information comes from the completed manifest turned in by the driver.

Conclusion

The shipment planning process is a key process in the Home Express system. The screens described in this section give the planner a great deal of flexibility for scheduling deliveries and updating orders.

Performing Call-Ahead Tasks

Description

Before a delivery is made, the agent partner calls the consignee. The purpose of the call ahead is to confirm the order information, get details about the location for the delivery, and notify the consignee of the delivery date and time.



The call-ahead tasks can be done either before or after the shipment planning tasks.

The person performing the call-ahead tasks might be the same person who is doing the shipment planning. Some of the screens and steps used for the call-ahead process are the same as those used for shipment planning.

The Call Sheet screen is designed to be a checklist, so that the person performing the call-ahead tasks does not forget a step. Space is provided to record the date and time of a call. There are four times when a call might be made:

- At set off, to let the consignee know that his/her product is at the agent location.
- A first call-ahead, to gather information and confirm the date and time of delivery
- A second call-ahead, to remind the consignee that the delivery will be made.
- One hour before delivery, to let the consignee know that the driver is on his or her way.

1b. Click **Shipment Planning**.

SCAC Code	Order #	Consignee	Address/City/State	Zip	Order Type	Order Status	Freight Available	Actual SetOff	Est. Del. Date	Reg. Del. Time	Wei
ACHF	1329	Harold Wilson	432 Beach Court address 2 Duluth MI	55812	Returns	Set Off	3/10/2003	03/07/03			15
ACHF	1328	Harold Wilson	432 Beach Court address 2 Duluth MI	55812	Returns	Set Off	3/10/2003	03/07/03			15
ACHF	1318	Mary Smith	123 Oak street Duluth MN	55812	Returns	Set Off	3/5/2002	03/08/03			
ACHF	1315	Amy Hill	7854 Palm Court 2B Duluth MN	55811	Final Mile	Open	3/3/2003		3/9/2003	10:00AM	12
CECM	1313	Mary Jones	854 Washington Blvd. 2B Duluth MN	55812	Final Mile Customer Whse	Open	3/3/2003		3/3/2003	8:00AM	18
JOEE	1312	Larry Putnam	123 Oak Street Duluth MN	55813	Local	Open	3/3/2003		3/3/2003	10:00AM	15
ACHF	1311	Henry Paulson	8541 Oak Street 2B Duluth MN	55810	Final Mile Customer Whse	Open	3/3/2003		3/9/2003	8:00AM	38
ACHF	1310	Mary Jones	8541 Villa Park Lane Duluth MN	55812	Returns	Open	3/3/2003		3/3/2003	10:00AM	
ACHF	1308	Mary Jones	8541 Villa Park Lane Duluth MN	55812	Returns	Open	3/3/2003		3/3/2003	8:45AM	
ACHF	1306	Harold	432 Beach Court	55812	Final Mile	Open	3/4/2003		3/9/2003	10:30AM	17

Figure 98—Operations Home screen

1c. Select a truck date.
(Not shown.)

1d. Select a truck number.

2. Review the **Call Ahead** column and then click the consignee's name.

Consignee	Address	City/State/Zip	Weight	Actual Setoff Date	Est. Del. Date	Reg. Del. Time	Scheduled Date	Scheduled Time	Op's Entry	CA	info from driver	POD Name
Home Furnishing	8542 Junipur Road	Duluth MN, 55816	200	11/4/2003	11/11/2003		11/13/2003	12:00PM	5:00PM			
Joe's Discount Compu	652 Pine Avenue	Duluth MN, 55810	54	11/3/2003	11/13/2003		11/13/2003	8:15AM	10:00AM			

Figure 99—Entering proof of delivery information

Instructions: Locating an Order for Call-Ahead

Use the following steps to locate an order that requires pre-call.

1. Locate the order on the **Operations Planning** screen.
 - a. In the navigation bar, on the left side of the screen, click **Home**.
The system displays the **Operations Home** screen.
 - b. Click **Shipment planning**.
The system displays the **Operations Planning** screen, listing all shipments.
 - c. Select a truck date from the **Truck Date** drop-down list.
The system displays only the shipments for the date selected. Other shipments are hidden.
 - d. Select a truck number from the **Truck Number** drop-down list.
The system displays only the shipments for the truck selected. Other shipments are hidden.
 You must select a truck date before you can select a truck number.
 - e. Select a status from the **Order Status** drop-down list.
The system displays only the shipments with the order status selected. Other shipments are hidden.
 - f. If you want to sort the information, click a column heading.
 If you click a column heading once, the system sorts the data in ascending order (A-Z, 0-9). If you click the same column heading again, the system sorts the data in descending order (Z-A, 9-0).
2. Locate an order to call and then click the consignee's name.
The system displays the **Call Sheet** screen.
3. Review the information in the *Call Ahead Date/Time* fields. The following values indicate the pre-call status:
 - C—Called, spoke to someone
 - N—Called, no answer
 - V—Called, left a voice mail
 - Blank—Not yet called

1. Review the information.

2. Place the call using the number provided.

3. Follow the steps on the Call Sheet.

4. Record the date and time of each call.

5. Select a status code.

NAVL - Home Express - Microsoft Internet Explorer
Address: http://hdmtest.sirva.com/index2.asp

Order ID: 3206

Account Call Check List

Customer Name:	Acme Home Furnishings	Customer ID:	241	SCAC ID:	ACHF	Business Type:	Home Express
Order Number:	3206	Freight Available Date:	11/12/2003				
Consignee Name:	Bob Jones	Actual Set Off Date:					
Address:	123 Pine Avenue	Estimated Delivery Date/Time:	11/17/2003, Anytime				
Address 2:		Operations Scheduled Date/Time:					
City:	Duluth	Initial Set Off Call Date/Time:					
State:	MN	1st Pre-Call Date/Time:					
Zip:	55810	2nd Pre-Call Date/Time:					
Country:	United States	3rd Pre-Call Date/Time:					
Contact Name:	Bob Jones	4th Pre-Call Date/Time:					
Phone Number:	(555) 123-4568	Email:					
Cell Phone:		Correct Phone #					
Order Notes:		Recd. Date					
		Work Phone:					
		Product Description:	End Table End Table Lamp				

1) Introduction - Person, Agent, Reason for Call.
2) Confirm Order information Above. Propose Committed Date/Time Above.
3) Additional Delivery Instructions: major intersections are &
Driving directions:

Figure 100—Top portion of the Call Sheet screen

NAVL - Home Express - Microsoft Internet Explorer
Address: http://hdmtest.sirva.com/index2.asp

Order ID: 3206

3) Additional Delivery Instructions: major intersections are &
Driving directions:

4) Review Site Information:

Dwelling Type: Single Residence Type: Primary
Dwelling Number: Dwelling Color:
Stairs: No If yes, how many flights? 0 Elevator: No
Elevator Use Restrictions?
Narrow Doorways (Less than 34") in move path? No
Narrow Hallways (Less than 36") in move path? No
Identify Additional Information that may impact delivery:
5) Service Explanation - 2 man crew, placement, light set up, debris removal, path clear.
6) Confirm "Day of Move" contact information is the same as above, if different complete following:
1 Hour Prior Call Name: Phone Number:
At Delivery (or Pick-up) Name:
7) Give Agent Information and THANKS.

Save & Return to Operations Update Call Information Print Delivery Receipt

Figure 101—Bottom portion of the Call Sheet screen

Instructions: Performing the Call-Ahead



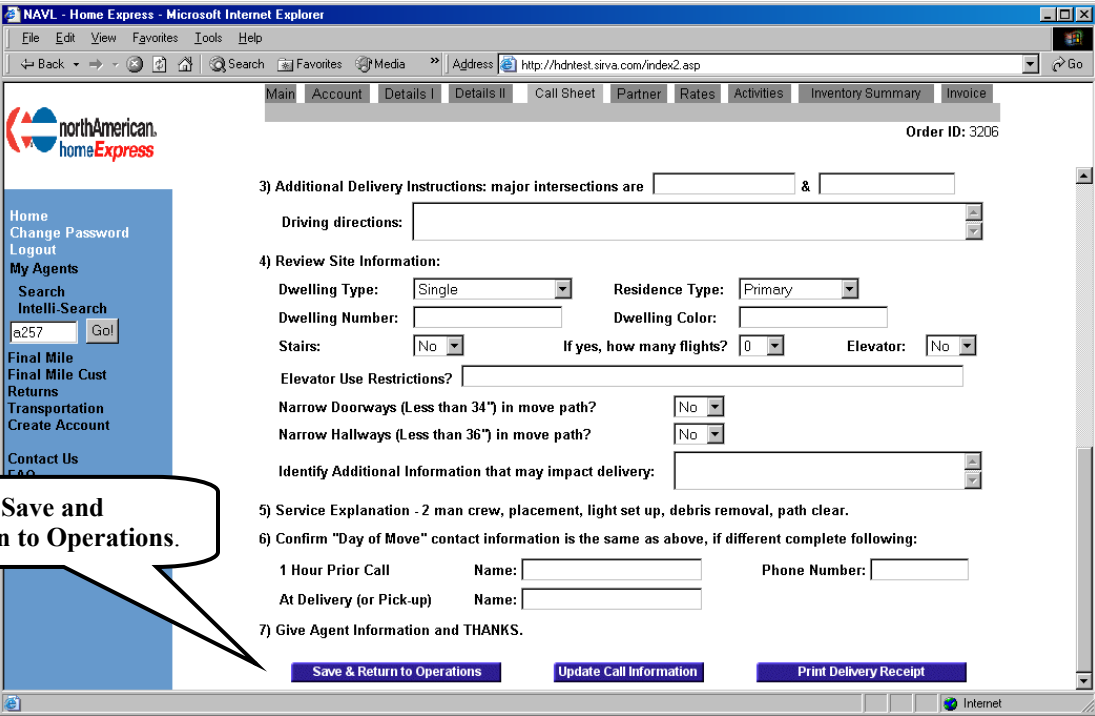
These steps assume that you have already located an order than needs a pre-call. If you have not, use the Operations Planning screen to locate an order. See “Instructions: Locating an Order for ” on page 211.

1. Review the order information at the top of the screen, including the scheduled date and time.
2. Place the call, using the phone number provided.
3. Follow the steps on the **Call Sheet**.
 - a. Perform the introduction. (Step 1 on the **Call Sheet** screen.)
 - b. Confirm the order information listed at the top of the screen, and propose a delivery date and time. (Step 2 on the **Call Sheet** screen.)
 - 1) If the information is correct, continue with the next step in this procedure.
Or
 - 2) If the information is not correct, make corrections.



If the scheduled date and time don't work for the consignee, you might need to notify the shipment planner.

- c. Review delivery instructions with the consignee. Record the information in the text boxes. (Step 3 on the **Call Sheet** screen.)
 - d. Review the site information with the consignee. Use the drop-down lists and text boxes to record information. (Step 4 on the **Call Sheet** screen.)
 - e. Explain the services that will be performed. (Step 5 on the **Call Sheet** screen.)
 - f. Confirm “day of move” information. Record the information in the text boxes. (Step 6 on the **Call Sheet** screen.)
 - g. Close the call. Be sure to give the consignee your agency information and thank the consignee. (Step 7 on the **Call Sheet** screen.)
4. Record the date and time of the call in the appropriate date and time field.
5. Select a call status from the drop-down list.
 - C—Called, spoke to someone
 - N—Called, no answer
 - V—Called, left a voice mail
 - Blank—Not yet called



NAVL - Home Express - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Stop Search Favorites Media Address: http://hdntest.sirva.com/index2.asp Go

Main Account Details I Details II Call Sheet Partner Rates Activities Inventory Summary Invoice

Order ID: 3206

3) Additional Delivery Instructions: major intersections are [] & []

Driving directions: []

4) Review Site Information:

Dwelling Type: [Single] Residence Type: [Primary]

Dwelling Number: [] Dwelling Color: []

Stairs: [No] If yes, how many flights? [0] Elevator: [No]

Elevator Use Restrictions? []

Narrow Doorways (Less than 34") in move path? [No]

Narrow Hallways (Less than 36") in move path? [No]

Identify Additional Information that may impact delivery: []

5) Service Explanation - 2 man crew, placement, light set up, debris removal, path clear.

6) Confirm "Day of Move" contact information is the same as above, if different complete following:

1 Hour Prior Call Name: [] Phone Number: []

At Delivery (or Pick-up) Name: []

7) Give Agent Information and THANKS.

Save & Return to Operations Update Call Information Print Delivery Receipt

Internet

5. Select Save and Return to Operations.

Figure 102—Bottom portion of the Call Sheet screen

6. Do one of the following:
 - Click **Save & Return to Operations**.
The system saves the information on the call sheet and returns to the **Operations Planning** screen.
 - Click **Update Call Information**.
The system saves the information on the call sheet and stays on the **Call Sheet** screen.
 - Click **Print Delivery Receipt**.
The system prints a delivery receipt for this order.

Field Table: Call Sheet Screen

The following fields are used on the Call Sheet screen.

Table 31—Call Sheet screen field definitions

Field Name	Description	Field Type	Notes
Order ID	ID number used to uniquely identify an order in the Home Express system.	Display only	
Customer Name	Name of the company that is shipping product to the consignee.	Display only	Synonymous with account.
Customer ID	Identification number for the account that is shipping products to the consignee.	Display only	
SCAC ID	SCAC ID for the account that is shipping products to the consignee.	Display only	SCAC is an abbreviation for Standard Carrier Alpha Code. A SCAC ID is a four-character code used to identify the account.
Business Type	Will always show <i>Home Express</i> .	Display only.	
Order Number	Sequential number assigned to the order by the Home Express system for identification purposes.	Display only	Assigned to the order when it was created.
Consignee Name	Name of person or company the account is shipping product to.	Display only	Displays information that was entered when the order was placed. Cannot be changed.
Address	First line of the address of the consignee.	Optional	Displays information that was entered when the order was placed. Can be changed if the original information was incorrect.
Address 2	Second line of the address of the consignee.	Optional	Displays information that was entered when the order was placed. Can be changed if the original information was incorrect.
City	City of the consignee.	Optional	Displays information that was entered when the order was placed. Can be changed if the original information was incorrect.

Field Name	Description	Field Type	Notes
State	State of the consignee.	Display only	Displays information that was entered when the order was placed. Cannot be changed.
Zip	Zip code of the consignee.	Optional	Displays information that was entered when the order was placed. Can be changed if the original information was incorrect.
Country	Country of the consignee, default is United States.	Display only	Displays information that was entered when the order was placed. Cannot be changed.
Contact Name	Name of contact person at the consignee's location. May or may not be the same as the consignee.	Optional	Displays information that was entered when the order was placed. Can be changed if the original information was incorrect.
Phone Number	Phone number of the contact person.	Optional	Displays information that was entered when the order was placed. Can be changed if the original information was incorrect.
Cell Phone	Cell phone number of the contact person.	Optional	Displays information that was entered when the order was placed. Can be changed if the original information was incorrect.
Order Notes	Any special instructions or comments that apply to this order.	Optional	Displays information that was entered when the order was placed. Can be changed.
Freight Available Date	Date when the freight should arrive at the agent location.	Display Only	Entered when the order is created.
Actual Set Off Date	Date when the freight actually arrived at the agent location.	Display Only	Entered on the operations Home screen or on the Details II screen.
Estimated Delivery Date/Time	Estimated date of delivery to the customer, followed by the preferred delivery time.	Display Only	The date is either calculated or typed when the order is created. The time is the preferred delivery time that is typed when the order is entered.
Operations Scheduled Date/Time	Delivery date and time assigned by the agent's operations planner.	Display Only	

Field Name	Description	Field Type	Notes
Initial Set Off Call Date/Time	Date and time when the agent called the consignee let him/her know the product had arrived.	Optional	
1 st Pre-Call Date/Time	Date and time when the agent made the first pre-call.	Optional	
Call Status	Indicates whether or not the agent spoke to someone about the shipment.	Optional	This field is not labeled on the screen; it is a drop-down list to the right of the 1st Pre-Call Date/time fields. Use the following values: • C—Called, spoke to someone • N—Called, no answer • V—Called, left a voice mail • Blank—Not yet called
2 nd Pre-Call Date/time	Date and time when the agent made the second pre-call.	Optional	
Call Status	Indicates whether or not the agent spoke to someone about the shipment.	Optional	This field is not labeled on the screen; it is a drop-down list to the right of the 2nd Pre-Call Date/time fields. Use the following values: • C—Called, spoke to someone • N—Called, no answer • V—Called, left a voice mail • Blank—Not yet called

Field Name	Description	Field Type	Notes
3 rd Pre-Call Date/time	Date and time when the agent made the third pre-call.	Optional	
Call Status	Indicates whether or not the agent spoke to someone about the shipment.	Optional	This field is not labeled on the screen; it is a drop-down list to the right of the 3rd Pre-Call Date/time fields. Use the following values: • C—Called, spoke to someone • N—Called, no answer • V—Called, left a voice mail • Blank—Not yet called
4 th Pre-Call Date/time	Date and time when the agent made the fourth pre-call.	Optional	
Call Status	Indicates whether or not the agent spoke to someone about the shipment.	Optional	This field is not labeled on the screen; it is a drop-down list to the right of the 4th Pre-Call Date/time fields. Use the following values: • C—Called, spoke to someone • N—Called, no answer • V—Called, left a voice mail • Blank—Not yet called
Email	Email address of the contact person.	Optional	Displays information that was entered when the order was placed. Can be changed if the original information was incorrect.
Correct Phone # Recd. Date:	Date on which the correct phone number for the contact person was received.	Optional	If the phone number is not correct, it is difficult to contact the consignee. When you receive the correct phone number, type it in the <i>Phone</i> field. Then, record the date on which you received the correct phone number in this field. In the future, anyone looking at the order will know that there was a delay in getting the correct phone number.

Field Name	Description	Field Type	Notes
Work Phone	Phone number of the contact person at work.	Optional	
Product Description	List of items that will be delivered to the consignee.	Display only	Displays information that was entered when the order was placed. Cannot be changed
Major Intersections	Two text fields that are used to record the major intersection closest to the consignee's address.	Optional	
Driving Directions	Instructions for driving to the consignee's address.	Optional	
Dwelling Type	Identifies the type of building where the delivery will take place.	Optional	This data is used to help the driver locate the correct building. Choices are: • Single (default) • Multi-unit Townhouse • Apartment Complex • Gym • Office
Residence Type	If the dwelling type is Single, identifies the type of residence for the consignee.	Optional	This data is used to help the driver locate the correct building. Choices are: • Primary (default) • Summer Home • 2 Story • Split • Bungalow
Dwelling Number	Physical location on the building of the house or building number.	Optional	For example, above garage or on mailbox.
Dwelling Color	Color of the house or other building to which product will be delivered.	Optional	This data is used to help the driver locate the correct building.
Stairs	Indicates whether or not there are stairs at the consignee's location.	Optional	Possible choices are: • Yes • No

Field Name	Description	Field Type	Notes
How Many Flights	If there are stairs at the consignee's location, this field is used to indicate the number of flights.	Optional	Possible choices are 0 to 9.
Elevator	Indicates whether or not there is an elevator at the consignee's location.	Optional	Choices are: • Yes • No
Elevator Use Restrictions	If there is an elevator at the consignee's location, this field is used to list any rules about the use of the elevator.	Optional	
Narrow Doorway	Indicates whether or not there is a narrow doorway at the consignee's location.	Optional	A narrow doorway is defined as one that is less than 34" wide. This field only applies if the doorway is in the move path. Possible choices are: • Yes • No
Narrow Hallway	Indicates whether or not there is a narrow hallway at the consignee's location.	Optional	A narrow hallway is defined as one that is less than 36" wide. This field only applies if the hallway is in the move path. Possible choices are: • Yes • No
Additional Information	Any notes or additional information that apply to this delivery.	Optional	
1 Hour Prior Call	Name of person to call one hour prior to the delivery. May or may not be the same as the consignee.	Optional	
Phone Number	Phone number of contact person that will be called one hour prior to the delivery.	Optional	
At Delivery (or Pickup)	Name of person to contact at delivery. May or may not be the same as the consignee.	Optional	

Conclusion

The pre-call process is a key process in the Home Express system because it is used to communicate with the consignee. The screens described in this section help to make sure that all of the steps needed to arrange a delivery are performed and that all of the information is recorded.

Appendix A - Using the Crystal Report Viewer

Crystal Report Viewer is a Web-based tool used to view and work with reports. Anytime you request a report from Home Express, it is displayed in a new Web browser window using Crystal Report Viewer. Options for working with a report include printing the report and searching for specific information. Most options are accessed from the Crystal Reports toolbar. The toolbar is described on the following pages.



See Instructions: Running Customer Reports on page 183 for information about creating reports. This section of the manual only covers viewing the report using Crystal Report Viewer.

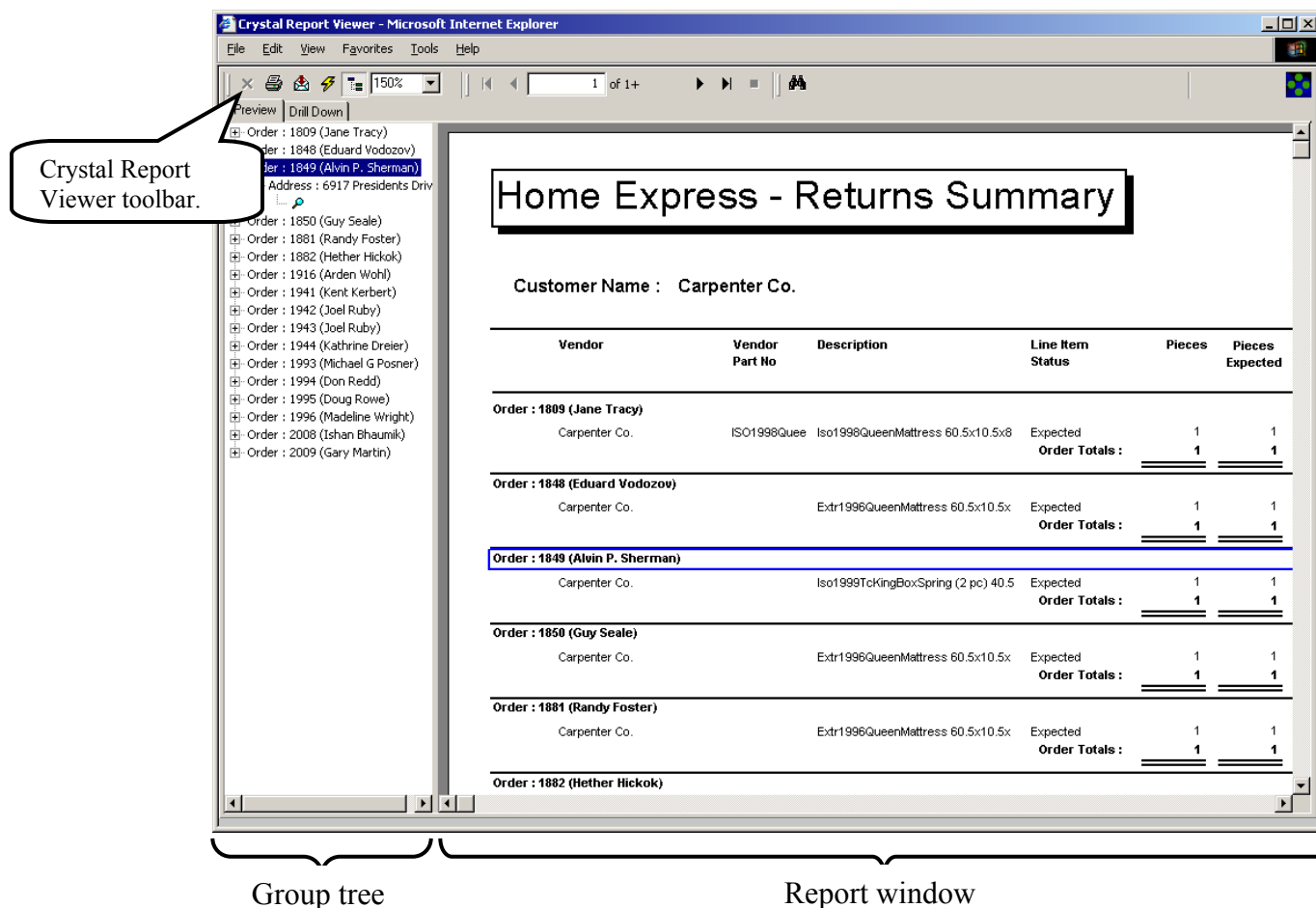


Figure 103—Report displayed using Crystal Report Viewer

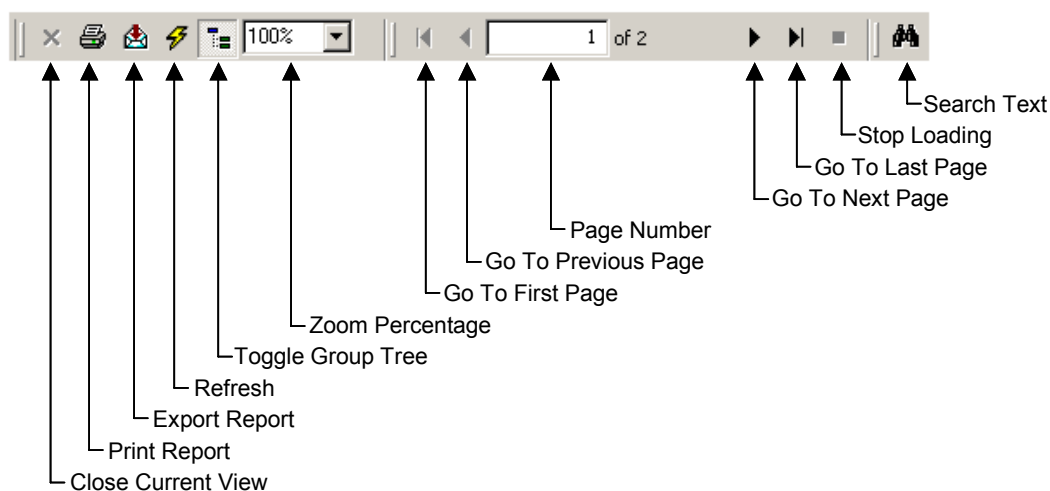


Figure 104—Crystal Report Viewer toolbar

Understanding the Crystal Report Viewer Toolbar

Use the following tools when working with Crystal Report Viewer. *See* Figure 103 and Figure 104 on page A-2.

Close Current View

This button is disabled when on the Preview tab but is available on the Drill Down tab. If you are on the Drill Down tab and click Close Current View, the system returns to the Preview tab. *See* Drilling Down on page A-9.

This button does not close Crystal Report Viewer. If you want to close Crystal Report Viewer, choose **Close** from the **File** menu or use the **Close** icon (the **X**) in the upper-right corner of the window.

Print Report

Displays the **Print** dialog box, which allows you to set printing options. Use the **Print** dialog box to define the number of copies, which pages are printed, the printer setup, and the font used to print. When you are ready to print, click **OK**.

Export Report

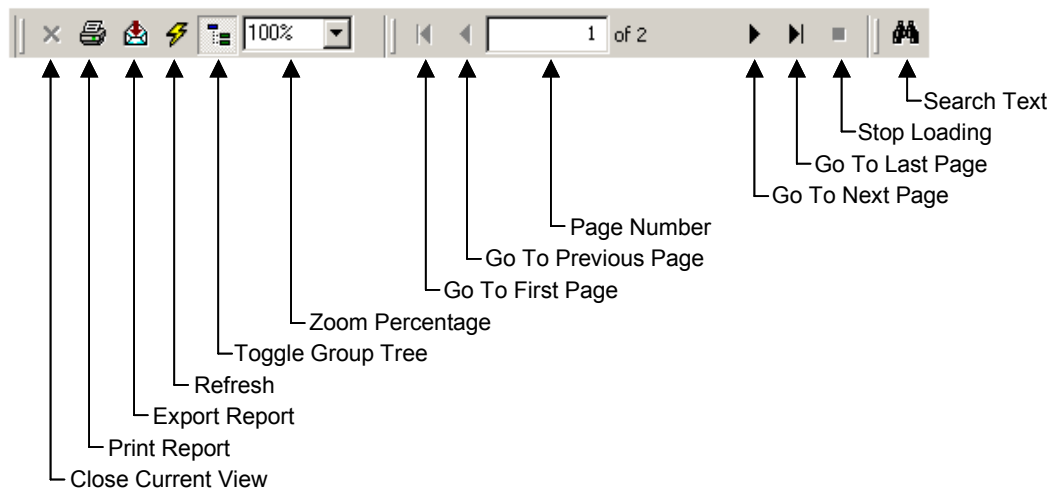
Allows you to save the report to a local or network drive, using various formats. You can then open the report using software other than Crystal Report Viewer. For example, you can save the report to your C: drive in a Microsoft Excel format. You can then open the report in Excel and analyze the data. *See* Exporting a Report on page A-11.

Refresh

Allows you to re-run the current report, using the same or different options. When a report is refreshed, the system uses the current information from the Home Express database. If information has changed since the report was originally run, you will see the most current information. *See* Refreshing a Report on page A-13.

Toggle Group Tree

The Toggle Group Tree button allows you to turn the group tree on and off. When turned on, the Group Tree is located on the left side of the screen. *See* Using the Group Tree on page A-9.

**Figure 105—Crystal Report Viewer toolbar**

Zoom Percentage

The **Zoom Percentage** button is used to enlarge and shrink the text on the report. In general, the higher you make the zoom percentage, the larger the text on the report. Enlarging the text makes it easier to read, but might also make the report too big for the screen. You would then use the scroll bars to move around the report page. Shrinking the report makes it fit on the screen better, but might make it hard to read. *See Changing the Zoom Percentage on page A-15.*

Go To First Page

In a multi-page report, the **Go To First Page** icon moves to the first page of the report.

Go To Previous Page

In a multi-page report, the **Go To Previous Page** icon moves backward one page. If you are on the first page of the report, this button is not available.

Page Number

The page number area shows the current page of the report and the total number of pages in the report. The system displays the current page number in a white box. To the right of the white box, in the grey area, is the total number of pages.

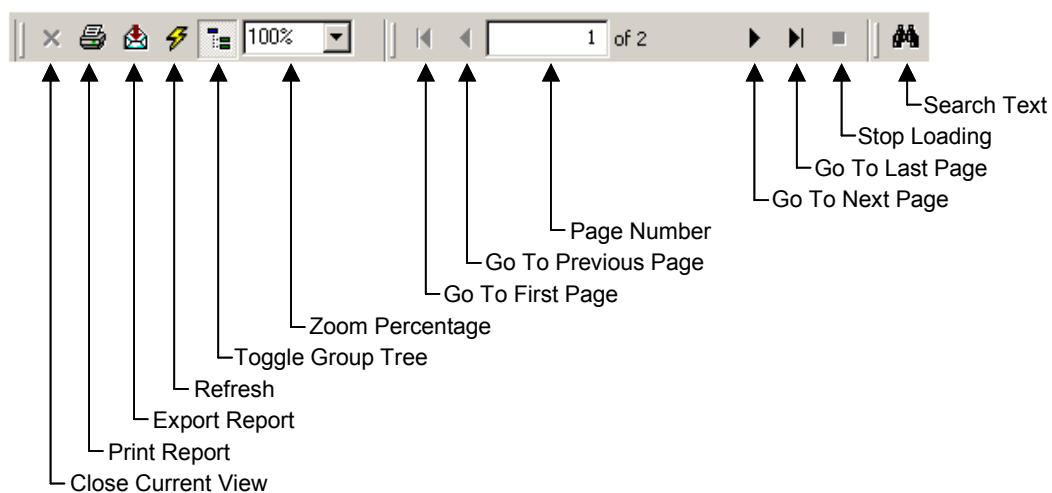
The total number of pages is not displayed immediately. The system cannot calculate the total number of pages until the report generation is complete. Until then, the total number of pages is listed as **1+**.

Go To Next Page

In a multi-page report, the **Go To Next Page** icon moves forward one page. If you are on the last page of the report, this button is not available.

Go To Last Page

In a multi-page report, the **Go To Last Page** icon moves forward to the last page of the report.

**Figure 106—Crystal Report Viewer toolbar**

Stop Loading

Sometimes reports can be very large and take a long time to load. If your report is taking too long to load, click the **Stop Loading** button to cancel the report.

Search Text

The Search Text button makes it easier to find information in a report. *See* Searching for Text on page A-15.

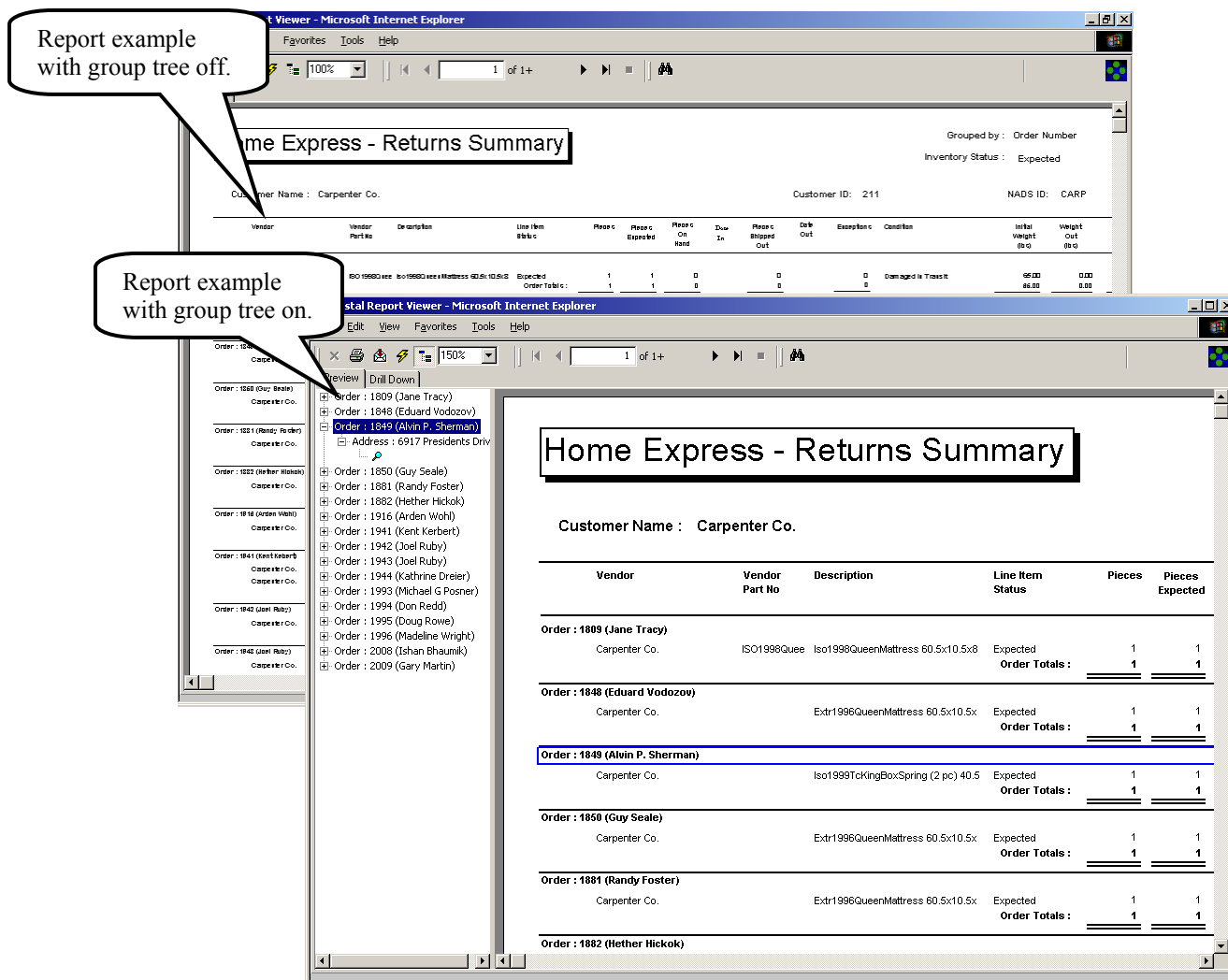


Figure 107—Reports displayed using Crystal Report Viewer

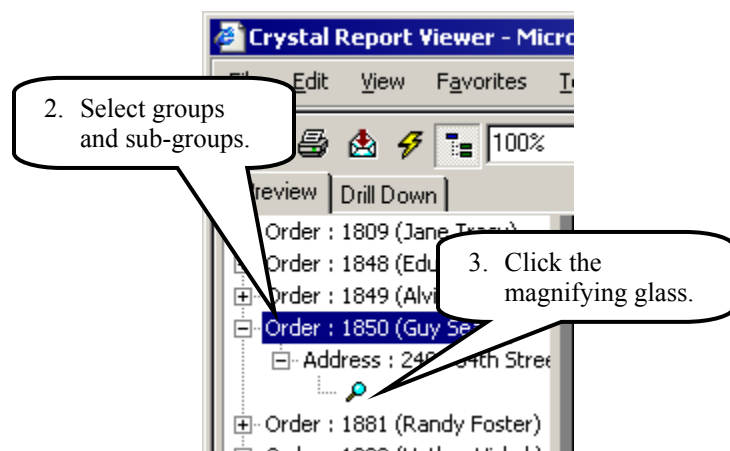


Figure 108—Using the Group Tree to drill down

Using the Group Tree

Data is organized in the group tree based on the sort order selected when the report was created. For example, if you create a report and choose order number for the Sort By field, the data is listed in the group tree sorted by order number.

The group tree works in the same way that other tree structures work. Use the plus sign (+) and minus sign (-) icons to expand and collapse a group. See Figure 108 on page A-8.

When you click on a group, the system highlights the corresponding information on the report.

Drilling Down

You can *drill down* to more detailed information using the Group Tree. Use the following steps to drill down to more detailed information:



If the Group Tree is not visible, click the Toggle Group Tree icon.

1. In the **Group Tree**, on the left side of the screen, click on the plus sign (+) next to the name of a group.

The system expands the group, showing sub-groups.

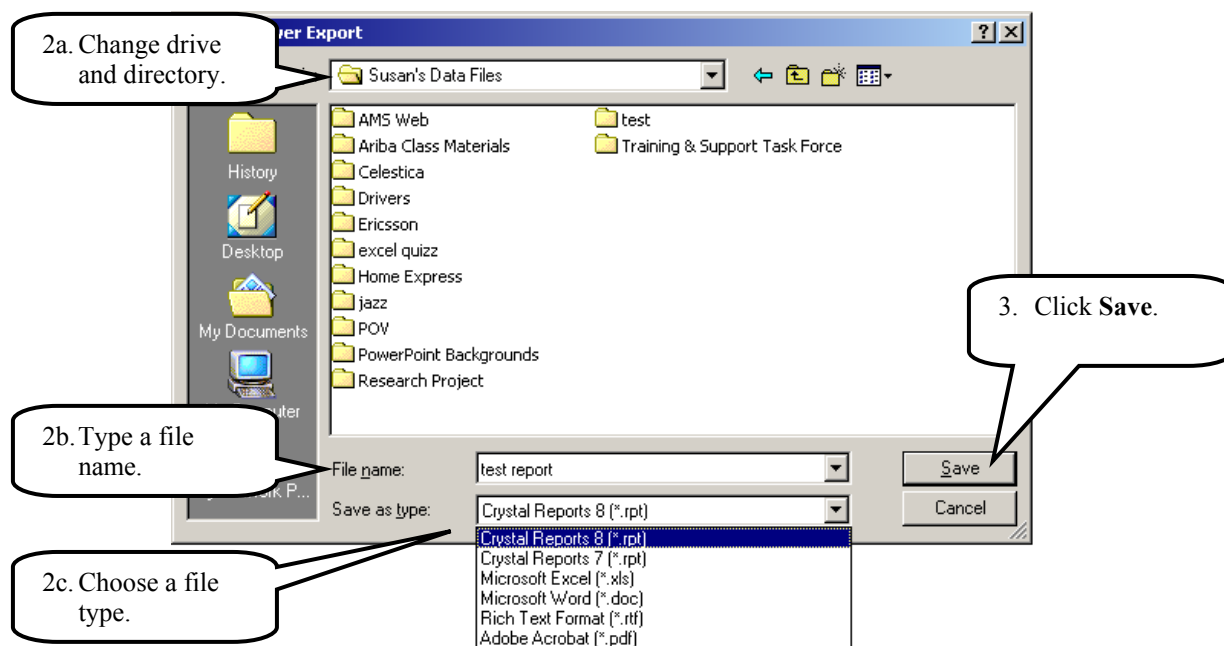
2. Continue expanding sub-groups until you see a magnifying glass icon.
3. Click the magnifying glass icon.

The system displays the **Drill Down** tab and the detailed information.



In Crystal Report Viewer, the **Preview** tab is the default tab.

4. To return to the **Preview** tab, click the **Close Current View** icon
Or
Click the **Preview** tab.

**Figure 109—Export dialog box in Crystal Report Viewer**

Exporting a Report

Exporting a report allows you save the report in different formats so that you can open it in a different software package. For example, you might want to save the report in a .XLS format so that you can import it into Microsoft Excel. Use the following steps to export the report:

1. Click the **Export Report** icon.
The system displays the Report Viewer Export dialog box. *See* Figure 109 on page A-10.
2. Change the file information as needed:
 - a. Change the drive and directory.
 - b. Type a filename.
 - c. Select a file type.
3. Click **Save**.
The system exports the report.

Please Provide Information - 1 of 3

You can provide a single value for this parameter. Choose or enter the value you want to include.

parGroupBy:
Group by:
Please enter a numeric value.

Value:
0.00

0.00 - Order Number
1.00 - Warehouse Location
2.00 - Location of Product
3.00 - Description

Help < Back Next > Cancel

2. Select an option from the **Group By** drop-down list.

3. Click **Next**.

Figure 110—Refresh Report dialog box

Please Provide Information - 2 of 3

You can provide a single value for this parameter. Choose or enter the value you want to include.

parStatus:
Inventory Status:
Please enter a numeric value.

Value:
1.00

1.00 - ALL
2.00 - Expected
3.00 - In
4.00 - Out

Help < Back Next > Cancel

4. Select an option from the **Inventory Status** drop-down list.

5. Click **Next**.

Figure 111—Refresh Report dialog box

Please Provide Information - 3 of 3

You can provide a single value for this parameter. Enter the value you want to include.

parCustomerID:
Customer ID:
Please enter a numeric value.

Value:
211.00

Help < Back Finish Cancel

6. Type a **customer ID** in the box.

7. Click **Next**.

Figure 112—Refresh Report dialog box

Refreshing a Report

It is possible that, after a report is generated, the data in the database might change. To update the report, you can use the Refresh Report button. The system prompts you for some information. After you provide the information, the system regenerates the report with the most up-to-date information available.



It might be easier to close the report and then regenerate it using the **Home Express—Customer Reports** screen.

Use the following steps to refresh the report:

1. Click the **Refresh Report** icon.
The system displays the first of three **Please Provide Information** dialog boxes and prompts you to select a Group By option.
2. Select an option from the **Group By** drop-down list.
3. Click **Next**.
The system displays the second of three **Please Provide Information** dialog boxes and prompts you to select an Inventory Status option.
4. Select an option from the **Inventory Status** drop-down list.
5. Click **Next**.
The system displays the third of three **Please Provide Information** dialog boxes and prompts you to type a customer number.
6. Type a customer number.
Or
To leave the current customer number in the field.
7. Click **Finish**.
The system regenerates the report.

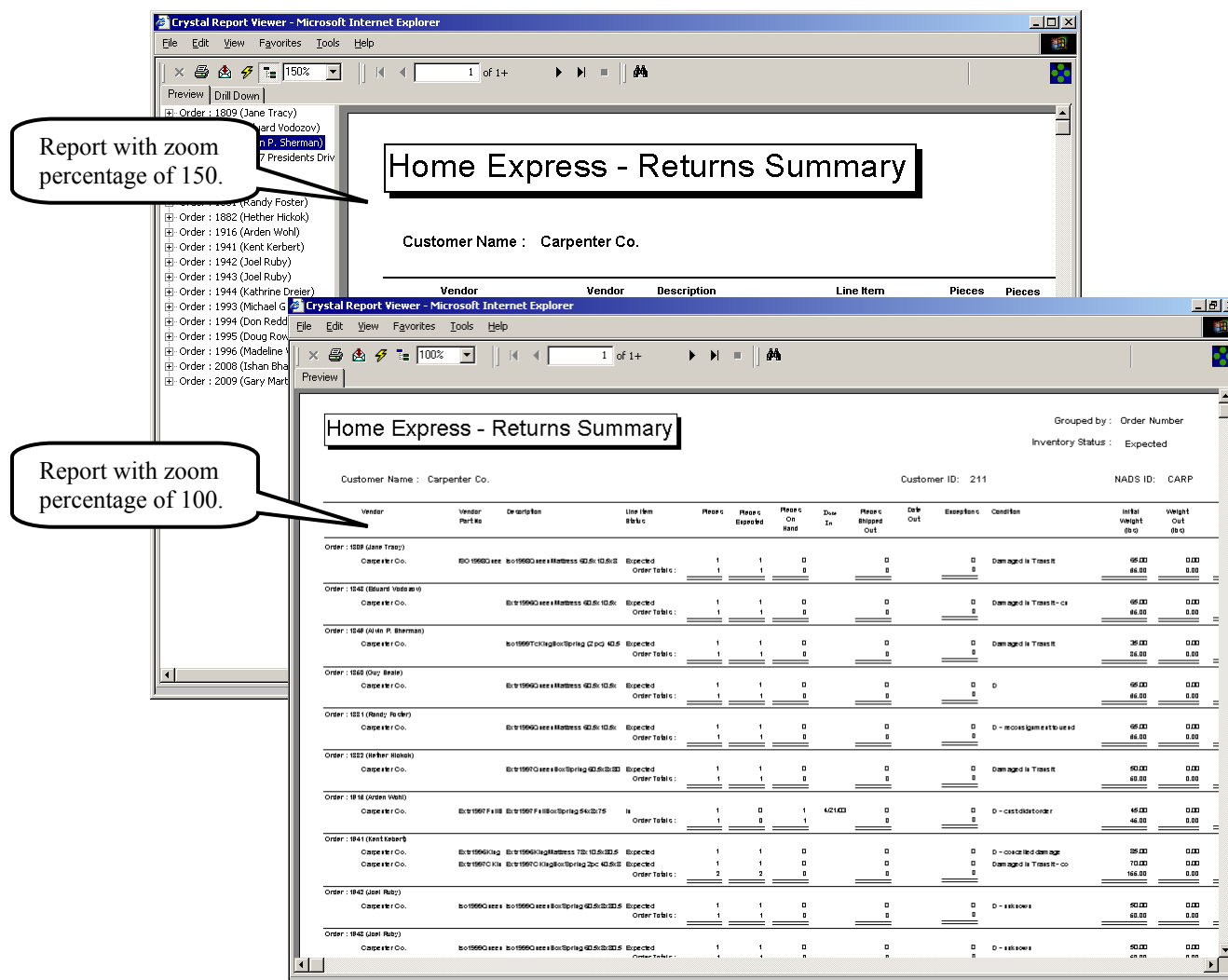


Figure 113—Reports displayed using Crystal Report Viewer

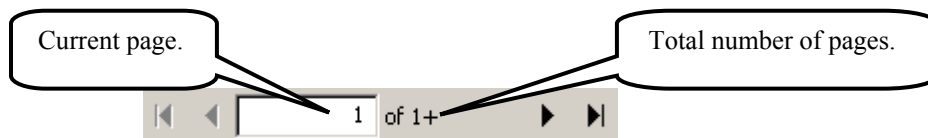


Figure 114—Icons used to change pages



Figure 115—Searching for text

Changing the Zoom Percentage

Changing the **Zoom Percentage** allows you to change the size of the text on the report. Several pre-set options are available.

The **Zoom Percentage** also includes two special options. **Page Width** will expand or shrink the report until it fills the report screen horizontally. **Whole Page** will expand or shrink the report until an entire page is displayed, both horizontally and vertically in the report screen.

1. Click the down arrow next to the *Zoom Percentage* field
2. Select a new number or width option.

Changing Pages



The system doesn't display the total number of pages until the report is completely generated and you click Next Page or Last Page. Until then, system displays **1+** in place of the total number of pages.

After the report is generated, the system displays the current page number in a white box. Use any of the following methods to change pages:

- Click the **First Page** button to move to the first page.
- Click the **Previous Page** button to move backward one page.
- Click the **Next Page** button to move forward one page.
- Click the **Last Page** button to move to the last page.
- If you want to go to a specific page, click in the page number box, type the page number, and then press **Enter**.

Searching for Text

Use the following steps to search for text:



Before searching, click the **First Page** icon. Then, the system will begin searching at the top of the report.

1. Click **Search Text**.
The system displays the **Search** dialog box.
2. Type the text you want to find.
3. Click **Find Next**.
The system searches for and highlights the next occurrence of the text.
4. To continue searching, click **Find Next** again.
Or
If you are done searching, click **Cancel**.

Appendix I - Index

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Reader Feedback

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